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Lawn&Garden Marketing

The merchandising magazine for lawn, garden and leisure living products.

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LAWN AND GARDEN ACTIVITIES – 1980-81

	Lawn Care		Vegetable Gardening		Indoor Houseplants		Flower Gardening		Shrub Care		Fruit/Berry Growing	
	1980 %	1981 %	1980 %	1981 %	1980 %	1981 %	1980 %	1981 %	1980 %	1981 %	1980 %	1981 %
Total U.S.	52	65	43	47	40	51	37	47	31	43	21	30
Men	61	69	44	46	24	46	29	46	37	44	24	30
Women	44	63	41	47	48	55	43	48	25	41	19	29
18-19 yrs.	[illegible]	61	32	41	39	56	27	45	23	39	13	24
30-49 yrs.	60	69	45	48	38	53	41	47	38	45	26	32
50 and over	50	63	48	51	35	46	39	48	32	44	23	33
College	62	70	42	47	49	61	43	55	44	52	27	36
High School	51	65	42	46	34	49	36	45	26	41	20	27
Grade School	38	53	47	52	24	36	28	38	17	29	17	26
East	46	56	41	42	33	46	35	41	29	38	16	19
Midwest	61	74	54	56	40	56	40	57	33	44	21	33
South	52	64	42	49	32	42	33	41	31	41	20	27
West	48	65	28	41	44	63	39	50	32	50	31	45
Professional	62	74	43	48	50	63	46	58	45	58	28	37
Business	62	69	43	46	44	57	42	56	43	51	26	30
Clerical/Sales	54	61	37	38	42	49	35	42	28	41	19	21
Manual	52	65	42	47	35	49	34	44	28	38	19	27
Retired	48	72	50	52	33	48	38	49	26	46	22	34

NA = Not Available.
Source: Gardens for All/Gallup Organization Survey.

Relationship of incomes and activities

(Incomes of households' principal wage earners)

	Lawn Care		Vegetable Gardening		Indoor Houseplants		Flower Gardening		Shrub Care		Fruit/Berry Growing	
Annual Income	1980	1981	1980	1981	1980	1981	1980	1981	1980	1981	1980	1981
Over $20,000	63%	77%	48%	53%	44%	60%	44%	57%	43%	38%	31%	36%
Under $20,000	47%	56%	40%	43%	33%	45%	32%	40%	25%	32%	16%	25%

Source: Gardens for All/Gallup Organization Survey.

Gallup reports:

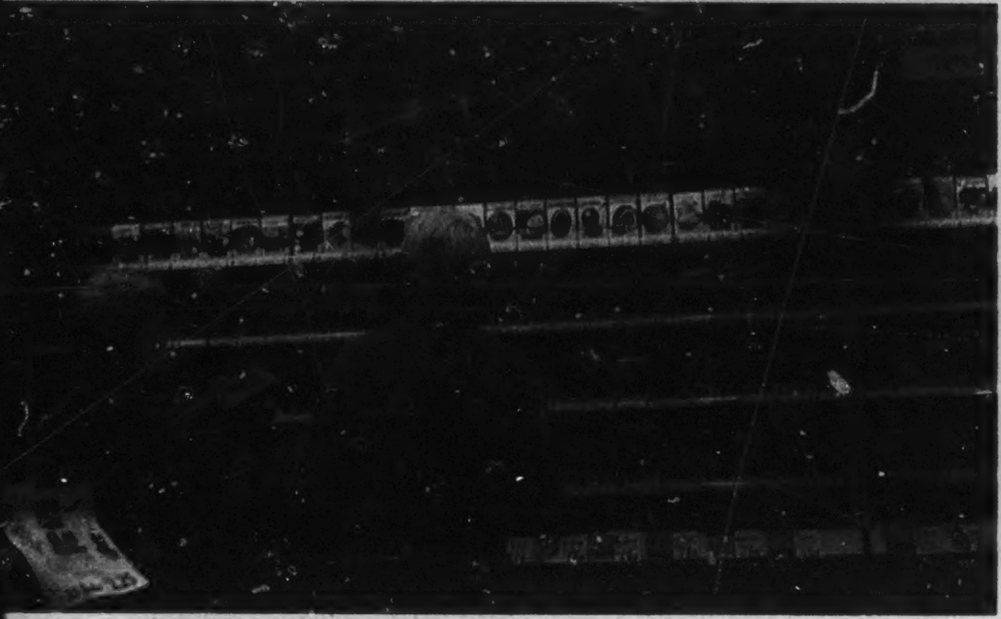
Record number of vegetable gardeners

■Forty-seven percent of all American households planted food gardens this year, bringing to 38 million the number of dining tables presumably graced with garden-fresh vegetables. More Americans planted vegetables this year than ever before in the history of the United States. More gardens, but the average starting size of the gardens is smaller: 547 square feet, compared with 663 square feet, average starting-size garden, in 1980.

These and other key facts and figures were obtained by the Gallup Organization, Princeton, N.J., in an annual, nationwide survey sponsored by Gardens for All, the National Association for Gardening, Burlington, Vt.

Profile of the 1981 vegetable gardener appearing most responsible for the increased number of gardens shows a woman in the 18-29 years age bracket, probably college educated inasmuch as the professional category presents the greatest percentage-increase, and living in

continued...



Shopping for vegetable varieties is interesting. Over half of the retired people are now engaged in food gardening.

More young women are growing vegetables than ever before in the United States.

Record number ...continued

In 1981 ten percent more men were involved in flower gardening compared with 1980.

the West. In 1980, western food-gardening interest dipped somewhat. The differences in percentages in these classifications appear very slight. All groups contributed to the rising interest in producing family food and becoming, to a degree, independent of an unpredictable economy.

"Just as the pressures of the war years produced the Victory Garden, today's many uncertainties and changing values are creating the Independence Garden. People seem to be rebuilding America backyard by backyard," says Dave Schaefer of Gardens for All.

Jack Robinson, president of Gardens for All, analyzed survey results this way: "All kinds of gardening—flower gardening, lawn care, indoor houseplants—are up significantly in our survey this year...People want to do more for themselves and make the best of their property. The ability to be creative and productive with what you have at home is a simple gift that is rediscovered whenever we experience tough times."

$16 billion in retail value

In dollars, the retail value of vegetables from home gardens was $16 billion, 23 percent more than in 1980, and an average yield of $368 per garden. "Saving money" was listed as a prime instigation for gardening, with "better tasting food," and "enjoyment" given as other principal reasons. According to the survey, vegetable gardening is the fifth most popular leisure pursuit in America, of 32 considered activities. Some, or all, of these reasons induced an additional seven million families in 1981 to grow vegetables in containers. Fifty-three percent of the conventional food-gardeners reported household incomes over $20,000. More fruit and berry growers also are in the over-$20,000 bracket, but those reporting a lower income apparently have increased in this gardening category.

Flower gardening continues as a popular pastime for the number of households equivalent to those engaged in growing vegetables: 47 percent. Lawn care showed the biggest jump, 1981 compared with 1980, in the women's category (19 percent difference), in the West (17 percent difference), and by retired people (14 percent difference). Approximately two-thirds of all American families care for lawns, with care of shrubs a logical adjunct involving increasing numbers of those who, heretofore, may have been only reluctant mowers of grass. □

AAN reports on plant sales data

Sixty-nine percent of the retailers completing the 1981 survey conducted by the American Association of Nurserymen reported that they had ordered more plants for spring, '81, than for the same season, 1980. Fifty-three percent of the respondents carried the same or less amount of green goods into the present season than they did last year.

Of the approximately 1500 AAN member firms surveyed, 135 more retailers responded this year: 619 national responses (41 percent) vs. 484 (32 percent) in 1980.

Regionally, south-southwest Region E provided the highest percentage of increase-affirming respondents: 89 percent reporting increased spring ordering. A 29 percent increase above 1980 in numbers of firms reporting fall carryover appears less optimistic. In a region where seasons sometimes merge, retailers may be less concerned than, elsewhere.

Except for Regions D and F (each, 2 percent fewer), those regions where seasons are more sharply defined reported an average of 6.5 percent more retailers showing a decreased carryover, reinforcing indications of increased spring sales.

Barring mountain areas, the California-Hawaii-Arizona-Nevada Region G enjoys transseasonal temperatures similar to south-southwest Region E. Region G, however, reported a healthy 21 percent of the AAN retailers carrying fewer plants into this season than in fall, 1980. Region G also indicated a large percentage (61 percent) increasing their orders over a year ago.

During their 1980-81 national public relations program, the AAN continued to encourage retailer-emphasis on the green gifts of nature; and to stress the significant role landscaping plays in increased property values.

REGIONAL STATISTICS

Region A (Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania, Delaware, Quebec)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 115 firms (76%)	MORE 53 firms (59%)
LESS 35 firms (24%)	LESS 12 firms (13%)
SAME 2 firms (.003%)	SAME 6 firms (7%)

Fall 1981 Carryover	Fall 1980 Carryover
MORE 65 firms (43%)	MORE 40 firms (44%)
LESS 42 firms (28%)	LESS 19 firms (21%)
SAME 45 firms (30%)	SAME 31 firms (34%)

Region B (Maryland, Virginia, West Virginia, Kentucky, District of Columbia, Tennessee, North Carolina, South Carolina, Florida, Georgia, Alabama, Mississippi)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 88 firms (77%)	MORE 50 firms (61%)
LESS 24 firms (22%)	LESS 11 firms (13%)
SAME 3 firms (3%)	SAME 9 firms (11%)

Fall 1981 Carryover	Fall 1980 Carryover
MORE 66 firms (57%)	MORE 50 firms (61%)
LESS 19 firms (17%)	LESS 14 firms (17%)
SAME 30 firms (26%)	SAME 18 firms (22%)

Region C (Ohio, Indiana, Illinois, Michigan, Wisconsin, Ontario)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 79 firms (56%)	MORE 73 firms (67%)
LESS 58 firms (41%)	LESS 20 firms (18%)
SAME 5 firms (4%)	SAME 10 firms (9%)

Fall 1981 Carryover	Fall 1980 Carryover
MORE 58 firms (42%)	MORE 40 firms (37%)
LESS 48 firms (34%)	LESS 29 firms (27%)
SAME 34 firms (24%)	SAME 39 firms (36%)

Region D (Minnesota, North Dakota, South Dakota, Iowa, Nebraska, Missouri, Kansas, Colorado, Wyoming, Saskatchewan, Manitoba)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 73 firms (68%)	MORE 52 firms (63%)
LESS 30 firms (28%)	LESS 17 firms (21%)
SAME 4 firms (4%)	SAME 7 firms (9%)

Fall 1981 Carryover	Fall 1980 Carryover
MORE 45 firms (42%)	MORE 45 firms (55%)
LESS 28 firms (26%)	LESS 23 firms (28%)
SAME 34 firms (32%)	SAME 14 firms (17%)

Region E (Texas, Louisiana, Arkansas, Oklahoma, New Mexico)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 41 firms (89%)	MORE 13 firms (68%)
LESS 5 firms (11%)	LESS 3 firms (16%)
SAME -0-	SAME 1 firm (5%)

Fall 1981 Carryover	Fall 1980 Carryover
MORE 31 firms (67%)	MORE 10 firms (53%)
LESS 3 firms (6%)	LESS 5 firms (26%)
SAME 12 firms (26%)	SAME 4 firms (21%)

Region F (Oregon, Washington, Montana, Idaho, Utah, Alaska, Alberta, British Columbia)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 11 firms (42%)	MORE 22 firms (65%)
LESS 14 firms (54%)	LESS 7 firms (21%)
SAME 1 firm (4%)	SAME 1 firm (3%)

Fall 1981 Carryover	Fall 1980 Carryover
MORE 14 firms (56%)	MORE 14 firms (41%)
LESS 4 firms (16%)	LESS 6 firms (18%)
SAME 7 firms (28%)	SAME 13 firms (38%)

Region G (California, Hawaii, Arizona, Nevada)

Spring 1981 Purchases	Spring 1980 Purchases
MORE 17 firms (61%)	MORE 10 firms (53%)
LESS 10 firms (26%)	LESS 5 firms (26%)
SAME 1 firm (4%)	SAME 1 firm (5%)

Fall 1981 Carryover	Fall 1980 Carryover
MORE 12 firms (43%)	MORE 9 firms (47%)
LESS 9 firms (32%)	LESS 2 firms (11%)
SAME 7 firms (25%)	SAME 8 firms (42%)

1979-80 Volume – Vegetable Types

	Production Area				Flats Sold		Percent of Sales at Wholesale		Wholesale Price		Value of Sales at Wholesale[1]	
State	1979	1980	Intended 1981	1981 as % of 1980	1979	1980	1979	1980	1979	1980	1979	1980
	1,000 Sq. Ft.			Percent	1,000 Flats		Percent		Dollars		1,000 Dollars	
Calif.	1,997	1,800	1,782	99	1,663	1,280	100	99	4.47	4.64	7,434	5,939
Colo.	294	265	267	101	166	125	48	71	4.81	4.04	798	505
Conn.	512	743	741	100	306	458	74	85	3.86	4.07	1,181	1,864
Fla.	737	640	643	100	459	596	95	100	4.43	3.59	2,033	2,140
Ga.	202	413	475	115	103	227	87	86	3.99	4.14	411	940
Ill.	533	576	585	102	319	295	70	63	3.88	4.10	1,238	1,210
Ind.[3]	357	452	503	111	168	228	39	49	4.14	4.50	696	1,026
Iowa	250	283	287	101	160	152	39	42	5.06	7.01	810	1,066
Kans.[3]	156	184	143	78	57	67	38	52	5.22	5.69	298	381
Md.	303	233	212	91	196	152	87	74	4.20	4.27	823	649
Mass.[3]	549	751	749	100	293	412	39	36	3.90	4.66	1,143	1,920
Mich.	2,593	2,379	2,506	105	1,589	1,427	80	84	3.40	3.72	5,403	5,308
Minn.	457	717	788	110	195	311	40	54	4.71	5.56	918	1,729
Mo.[3]	448	448	459	102	259	259	84	78	4.95	4.95	1,282	1,282
N.J.	233	815	805	99	117	342	61	74	4.28	4.74	501	1,621
N.Y.	1,227	1,224	1,235	101	621	699	68	62	4.19	4.77	2,602	3,334
N.C.	700	646	605	94	331	389	85	86	3.87	4.46	1,281	1,735
Ohio	2,050	2,609	2,636	101	1,030	1,348	80	77	3.59	4.21	3,698	5,675
Ore.	358	239	222	93	145	118	86	81	5.26	6.37	763	752
Pa.	643	636	656	103	311	415	75	62	4.32	3.30	1,344	1,370
Tenn.	232	268	277	103	147	214	81	72	4.27	4.31	628	922
Tex.	1,374	741	744	100	901	587	99	97	5.10	5.53	4,595	3,246
Va.[3]	350	339	346	102	238	243	69	64	4.37	4.63	1,040	1,125
Wash.	318	315	319	101	115	132	84	76	5.01	5.94	576	784
Wis.	343	330	333	101	183	197	49	61	4.76	4.87	871	959
Total	**17,216**	**18,046**	**18,318**	**102**	**10,072**	**10,673**	**80**	**78**	**4.21**	**4.45**	**42,367**	**47,482**

[1] Equivalent wholesale value of all sales.
[2] 1979 Revised.
[3] Does not include "Open Acreage" grown outdoors.
Source: Crop Reporting Board, USDA.

Bedding plant production leveled off in '80

Data presented are from the comprehensive report published by the Crop Reporting Board of the USDA in which information provided by commercial growers in major producing states has been summarized.

■ Wholesale sales of vegetable bedding plants in 1980 increased six percent from 1979. This year's rate of increase is 10 percent slower than reported in 1979, although sales have continued to climb since the 10 percent dip in number of flats sold in 1978.

The wholesale price-per-flat increase also was less in 1980 than in 1979; unit prices rose an average of 24 cents, 5 percent higher, 1980, after jumping 44 cents in the previous year. This is another indication that the rate-of-rise is slowing in the industry – in this case, almost 50 percent.

Ohio showed a 53 percent increase in the number of flats sold, 1980, compared with 1979. Highest increase reported, this represented, in terms of value of the flats at wholesale, 39 percent of the total wholesale value of flats sold by all reporting states, 1980 over 1979.

Missouri reported no change in 1980 over the previous year. The direction, however, was up for all but seven states. Of those states reporting decreased sales of flats in 1980, California, down 30 percent, and Texas, 53 percent, were last on the list.

For purposes of their report, the USDA defines commercial growers as those reporting $10,000 or more

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1979-80 Volume — Flowering-Foliar Types

State	Production Area				Flats Sold		Percent of Sales at Wholesale		Wholesale Price		Value of Sales at Wholesale[1]	
	1979	1980	Intended 1981	1981 as % of 1980	1979	1980	1979	1980	1979	1980	1979	1980
	1,000 Sq. Ft.			Percent	1,000 Flats		Percent		Dollars		1,000 Dollars	
Calif.[3]	6,200	8,000	8,088	101	4,961	4,498	99	96	4.71	5.92	23,366	26,628
Colo.	1,128	1,119	1,219	109	559	575	55	83	4.80	4.81	2,683	2,766
Conn.[3]	917	978	956	98	597	619	77	77	3.97	4.19	2,370	2,594
Fla.[2]	1,503	1,411	1,401	99	1,065	1,151	100	100	4.54	4.03	4,835	4,639
Ga.	541	720	872	121	270	381	85	87	3.67	4.17	991	1,589
Ill.	1,534	1,419	1,477	104	924	759	80	71	4.25	4.46	3,927	3,385
Ind.[2]	648	881	964	109	322	417	50	57	4.14	4.39	1,333	1,831
Iowa	469	496	499	101	228	253	52	51	5.41	6.97	1,233	1,763
Kans.[2]	351	376	401	107	147	157	67	61	6.18	7.12	908	1,118
Md.	945	911	943	104	579	456	80	66	3.56	4.55	2,061	2,079
Mass.	1,410	1,350	1,345	100	731	749	51	39	4.26	4.06	3,114	3,041
Mich.[3]	6,940	6,883	7,076	103	3,998	4,268	86	87	3.43	3.86	13,713	16,474
Minn.	1,675	1,550	1,658	107	654	695	44	59	5.13	5.40	3,355	3,753
Mo.[2]	822	931	956	103	518	533	85	86	4.80	4.86	2,486	2,590
N.J.	504	1,668	1,673	100	233	796	58	78	5.21	4.77	1,214	3,797
N.Y.	2,255	2,683	2,729	102	1,114	1,544	65	63	4.28	4.97	4,768	7,674
N.C.[2]	933	1,164	1,412	119	528	618	86	89	4.47	4.63	2,360	2,861
Ohio	6,500	6,215	6,240	100	3,300	3,241	84	82	3.75	4.11	12,375	13,321
Ore.	661	554	554	100	296	267	94	82	5.61	6.59	1,661	1,760
Pa.	1,404	1,732	1,754	101	695	1,245	75	67	4.29	4.19	2,982	5,217
Tenn.	456	567	584	103	260	410	82	76	4.21	4.23	1,095	1,734
Tex.	1,649	1,184	1,239	105	1,265	1,008	99	95	5.25	6.09	6,641	6,139
Va.[2]	640	682	672	102	410	465	81	75	4.66	4.73	1,911	2,199
Wash.	1,163	1,018	1,077	106	538	521	87	85	5.08	5.72	2,733	2,980
Wis.	878	923	924	100	512	561	60	68	4.91	5.07	2,514	2,844
Total	**42,126**	**45,415**	**46,713**	**103**	**24,704**	**26,187**	**83**	**81**	**4.32**	**4.76**	**106,629**	**124,776**

[1] Equivalent wholesale value of all sales.
[2] 1979 Revised.
[3] Does not include "Open Acreage" grown outdoors.
Source: Crop Reporting Board, USDA.

Bedding plants

continued from page 18

in gross sales of the green goods in question. During 1980 commercial growers of vegetable bedding plants dwindled by 91, nationwide. For this year, the remaining 2500 plus growers have planned an estimated increase in production area of two percent or 272,000 sq. ft. (approximately six acres) which is relatively insignificant.

During 1980 the wholesale sales of flowering and foliar types of bedding plants also increased six percent in 1980 to 26.2 million flats from 24.7 in 1979. This has a different connotation, however. For these types of bedding plants vs. the vegetable type, the "good" and "gloomy" years reversed; sales dipped four percent in 1979, flowering-foliar, rather than in 1978, when sales of vegetable bedding flats dropped.

The average wholesale price per flat increased 44 cents over the 1979 figure to $4.76, 1980. In 1980, flats showed a higher return in Kansas, at $7.12 wholesale, and were a buyer's bargain at $3.86 in Michigan, the only state staying below $4 per flat. Nationwide, the overall increase in price plus greater production resulted in a 17 percent larger wholesale value of $125 million.

Of this amount, California garnered the largest share — $26.6 million, over 20 percent — although the wholesale units sold in that state decreased in number.

The number of producers has been reduced in more than one half of those states economically concerned with flowering-foliar types of bedding plants. Only Kansas reported no change. Even with fewer growers, increased acreage has been scheduled for this year's production, with Georgia and North Carolina projecting plans for the greatest expansion. □

Product movement report:

Shown in the tables here are indicators of 1981 business volume in basic lines of merchandise by key garden centers, and key outdoor power equipment dealers. The data shown are for the individual companies reporting. The numbers CANNOT BE PROJECTED to represent the total market, even within the regions in which they are located. Not represented in this report are the sales and inventory increases or decreases in hardware/home centers and in multi-department stores. The reporting period is for January through July, 1981.

Definitions

● **Garden centers** = Retail outlets specializing in the broad line of lawn and garden products including fertilizer, chemicals, tools, garden hose and accessories, etc. Most depend heavily on sales of green goods. Some of the garden centers handle small quantities of outdoor power equipment. This classification does not include the lawn and garden departments of home centers or other multi-department stores.

● **Outdoor Power Equipment Dealers** = Retailers whose main business is selling and servicing gasoline-powered lawn, garden and grounds equipment. Some of them handle small quantities of fertilizer, chemicals and other products shown in this report. However, due to insignificant quantities handled, they are not shown in the tables.

WEST

Percent Change between 1980 and '81

	Sales	End-of-Season Inventory
Garden Center #1		
Walk-behind Mowers	NA	NA
Spin Trimmers	−46	DNA
Lawn Fertilizer	+12	DNA
Outdoor Chemicals	+26	DNA
Garden Tools	− 4	DNA
Watering Equipment	+23	DNA
Garden Center #2		
Walk-behind Mowers	NA	NA
Spin Trimmers	NA	NA
Lawn Fertilizer	+21	− 14
Outdoor Chemicals	+20	+ 10
Garden Tools	−15	+ 9
Watering Equipment	−25	− 79
Garden Center #3		
Walk-behind Mowers	− 7	− 17
Spin Trimmers	− 8	− 14
Lawn Fertilizer	+25	+ 20
Outdoor Chemicals	NA	NA
Garden Tools	No change	+ 20
Watering Equipment	No change	No change
OPE Dealer #1		
Walk-behind Mowers	+15	+ 90
Spin Trimmers	−10	+ 13
OPE Dealer #2		
Walk-behind Mowers	+11	− 19
Spin Trimmers	−16	− 25
OPE Dealer #3		
Walk-behind Mowers	+19	+ 54
Spin Trimmers	+46	+133
OPE Dealer #4		
Walk-behind Mowers	− 9	− 5
Spin Trimmers	−21	− 30

SOUTH

Percent Change between 1980 and '81

	Sales	End-of-Season Inventory
Garden Center #1		
Walk-behind Mowers	− 34	DNA
Spin Trimmers	+ 88	DNA
Lawn Fertilizer	+ 11	DNA
Outdoor Chemicals	− 10	DNA
Garden Tools	+ 14	DNA
Watering Equipment	+ 44	DNA
Garden Center #2		
Walk-behind Mowers	.....	.....
Spin Trimmers	.....	.....
Lawn Fertilizer	− 28	+ 6
Outdoor Chemicals	− 12	+ 6
Garden Tools	− 6	+ 6
Watering Equipment	− 5	+ 6
Garden Center #3		
Walk-behind Mowers	+ 15	+ 10
Spin Trimmers	− 6	+100
Lawn Fertilizer	+ 7	+.....
Outdoor Chemicals	+ 3	+ 13
Garden Tools	+ 9	.....
Watering Equipment	+ 20	.....
Garden Center #4		
Walk-behind Mowers	.....	.....
Spin Trimmers	.....	.....
Lawn Fertilizer	+ 13	− 33
Outdoor Chemicals	.....	.....
Garden Tools	+ 7	.....
Watering Equipment	− 29	+ 67

spring and summer

■Although the nation's homemakers took to gardening and lawn care in greater numbers in 1981 than in 1980, they were cautious in their spending on high-ticket items for lawn and garden activities.

Reports to **Lawn & Garden Marketing** from specialty retailers showed, however, that this business held up well, considering the general economic downturn. Sales held steady or did not drop as much as in

continued...

	Sales	End-of-Season Inventory
OPE Dealer #1		
Walk-behind Mowers	+ 9	+ 75
Spin Trimmers	+ 11	− 67
OPE Dealer #2		
Walk-behind Mowers	+ 6	+ 11
Spin Trimmers	+100	+ 40
OPE Dealer #3		
Walk-behind Mowers	+ 17	− 80
Spin Trimmers	+ 25	− 84

	Sales	End-of-Season Inventory
OPE dealer #4		
Walk-behind Mowers	− 10	− 38
Spin Trimmers	.....	.....
OPE Dealer #5		
Walk-behind Mowers	+ 19	+ 75
Spin Trimmers	+ 17	.....
OPE Dealer #6		
Walk-behind Mowers	− 13	NA
Spin Trimmers	+ 6	NA

NORTHEAST

Percent Change between 1980 and '81

OPE Dealer	Sales	End-of-Season Inventory
OPE Dealer #1		
Walk-behind Mowers	+45.8	− 36
Spin Trimmers	+32.4	− 80
OPE Dealer #2		
Walk-behind Mowers	−19	− 29
Spin Trimmers	+20	+ 44
OPE Dealer #3		
Walk-behind Mowers	− 9	+ 67
Spin Trimmers	+15	− 46
OPE Dealer #4		
Walk-behind Mowers	+17.4	− 50
Spin Trimmers	−76.9	− 71
Garden Center #1		
Walk-behind Mowers	−18	− 44
Spin Trimmers	−17	+ 20
Lawn Fertilizer	+14	+135
Outdoor Chemicals	+20	− 10
Garden Tools (non-power)	+17	− 25
Watering Equipment	+11.1	− 29
Garden Center #2		
Walk-behind Mowers	+25	+133
Spin Trimmers	+67	+350
Lawn Fertilizer	+26	NA
Outdoor Chemicals	+33	NA
Garden Tools	+15	+ 67
Watering Equipment	+ 8	+ 96

NORTH CENTRAL

Percent Change between 1980 and '81

	Sales	End-of-Season Inventory
Garden Center #1		
Walk-behind Mowers	− 27	− 45
Spin Trimmers	+ 12	+100
Lawn Fertilizer	+ 36	+ 22
Outdoor Chemicals	+ 73	+ 57.4
Garden Tools	+ 7	− 1
Watering Equipment	− 10	+ 82
Garden Center #2		
Walk-behind Mowers	.....	.....
Spin Trimmers	− 41	− 37
Lawn Fertilizer	+ 73	+150
Outdoor Chemicals	+ 14	− 23
Garden Tools	+ 24	.....
Watering Equipment	− 12	+125
Garden Center #3		
Walk-behind Mowers	− 32	+208
Spin Trimmers	− 23	− 18
Lawn Fertilizer	+ 6	+ 39
Outdoor Chemicals	+ 22	+ 10
Garden Tools	+ 23	− 43
Watering Equipment	− 10	− 33
OPE Dealer #1		
Walk-behind Mowers	+ 14	+ 41
Spin Trimmers	− 51	− 58
OPE Dealer #2		
Walk-behind Mowers	− 15	− 33
Spin Trimmers	+ 46	+250
OPE Dealer #3		
Walk-behind Mowers	+ 79	+100
Spin Trimmers	+150	.....
OPE Dealer #4		
Walk-behind Mowers	+ 68	− 31
Spin Trimmers	+ 39	− 62
OPE dealer #5		
Walk-behind Mowers	+ 28	+ 50
Spin Trimmers	+ 7	− 6

The "Best Seller" list

The reporting retailers listed the following as products which generated exceptionally good sales in the 1981 season.

GARDEN CENTERS

Northeast

- Lawn fertilizers
- Outdoor chemicals (especially for gypsy moths)
- Lawn mowers
- Tractors
- Fertilizer
- Chain saws
- Wheelbarrows
- Private brand lawn fertilizers
- Short handle gardening tools, pruners, trowels, etc.

North Central

- Lawn fertilizer
- Chemicals
- Gasoline-powered trimmers
- Garden seeds
- Vegetable plants
- Grass seed
- Lawn spreaders
- Mulches
- Landscape timbers
- Electric bug killers
- Gas grills
- Seeds
- Sets
- Bulbs
- Fruits—large and small
- Bedding plants

South

- Bedding plants (especially 4-in. and 6-in. size)
- Nursery stock (trees and shrubs)
- Spring-planted bulbs (caladiums, canna, gladiola, dahlia, etc.)
- Bedding plants
- Tillers
- Nursery and greenhouse items
- Hardgoods
- Outdoor chemicals

West

- Grasshopper spore (Reuter)
- Ortho Kleenup (in ready-to-use sprayer)
- Rapid-Gro
- Ames hand trowels
- Rose food
- Colorado's Own Benomyl
- Henri fountains and bird baths
- Ortho Funginex
- Terra-Lite professional potting soil
- Entek Super Soaker

POWER EQUIPMENT DEALERS

Northeast

- Chain saws
- Riding mowers
- Tillers
- Lawn fertilizer
- Trimmers
- Lawn mowers
- Gasoline-powered spin trimmers
- Gasoline chain saws
- Ribbon lawn compact hose
- Bug killers
- Outdoor gas grills
- Bobcat commercial mowers
- Gravely 4-wheel tractors
- Snapper walk-behind mowers

North Central

- Wheel Horse tractors
- Lawn Boy lawn mowers
- Snapper riders
- Commercial heavy-duty walk-behind mowers
- Commercial gas-powered spin trimmers
- Toro mowers
- Gasoline-powered line trimmers

South

- Leaf blowers
- Trimmers
- Blowers
- Stihl chain saws and trimmers
- Kero-Sun heaters
- Toro mowers
- Ariens rear-engine riders
- Lawn Boy mowers and trimmers
- Snapper mowers
- Green Machine trimmers
- Kero-Sun heaters
- Toro
- John Deere
- Lawn Boy
- Snapper
- Echo and John Deere trimmers

West

- 11-h.p. and above mowers
- Snapper walk-behind mowers
- Gilson rear-tine rototillers
- Toro sprinkler systems for do-it-yourselfers
- Stihl brushcutters

many other consumer lines.

Using as a barometer the feedback from the reporting retailers, it appears that the outdoor power equipment dealers in the North Central and in the South, with the exception of Florida, made some gains in sales following the drought of 1980. Data from Florida confirm other reports from that state that sales of lawn mowers were slow even after rains broke the dry spell of 1980 and early 1981.

Garden centers, as expected, fared less well in selling power equipment, owing to minimal emphasis on service and breadth of line, and less product dominance. But the garden centers showed gains in fertilizer, chemicals and garden tools.

Gypsy moth controls

In the Northeast, gypsy moths made the news pretty consistently, and gypsy moth control products were among the best sellers for garden centers. The progressive garden center operators offered not only chemical control products, but also non-toxic devices such as traps and even burlap, which can be used to wrap around trees as a control system.

From the Washington, D.C. area a retailer wrote: "...hardgoods were up, overall, mainly due to ideal weather compared to rain all through spring of 1980."

From Florida, a power equipment dealer wrote, "...we had a dry spring and early summer. Sales were hard to make with the drought. We worked extra hard and gave customers extra good service to increase sales through these times."

From California came these comments, which confirmed previous reports of a slowdown there in business for the specialty retailers: a garden center manager wrote, "We moved...and added green goods to our inventory mix. Homeowner and commercial sales have been slow for the last two years." And a power equipment dealer in California said that his total unit sales in power equipment were down 12 percent and dollar volume was down six percent. □

Table 1 **Product groups expected to show most growth**

	All Stores %*	National %*	Traditional %*	Discount %*	Variety %*	Supermarket %*	Drug Store %*	Auto Supply %*
Nursery stock	15	12	5	33	5	32	19	...
Garden tools	9	4	10	11	14	14	3	8
Patio and outdoor living	21	4	38	34	19	14	17	8
Snow removal equipment	1	...	...	...	...	...	...	3
Power equipment, hand-held	9	4	8	3	5	...	...	19
Outdoor power equipment	20	40	20	11	11	4	...	43
Watering equipment	5	4	...	3	5	7	8	5
Irrigation equipment	1	...	...	1	...	...	3	...
Garden chemicals	7	4	5	12	5	7	14	1
Fertilizer	5	12	5	9	3	11	3	1
Soil amendments	1	...	...	3	3	4	...	...
Garden supplies	4	8	5	5	3	11	6	...
Indoor plant accessories	2	...	3	3	3	14	...	...
Energy products	14	24	13	14	11	...	17	15
Gifts, holiday decor	3	...	3	3	16	...	3	...

*Adds to more than 100.0% due to multiple responses.
Source: LGM surveys

Definitions – Multi-department stores

NATIONAL DEPARTMENT STORES – Sears, Montgomery Ward, J. C. Penney...

TRADITIONAL DEPARTMENT STORES – Macy's, Marshall Field's, Gimbel's, etc.

DISCOUNT DEPT. STORES – K-Mart, Woolco, Venture..

AUTO SUPPLY CHAINS – Western Auto, OTASCO...

VARIETY STORES – Woolworth's...

Product Groups

For more detail on the products included in the categories in table 1, see page 36.

In volume buyers' view

Most growth potential is in patio and OPE

Multi-department store buyers rank growth potential of selected product lines. This report also includes ranking of factors in taking on a product line, and buyers' tenure in current positions.

■Patio living products and outdoor power equipment are the best hope as growth products by buyers of lawn and garden merchandise for multi-department stores. This is the view of the buyers for these stores who responded to a survey conducted early this year. The survey asked for their predictions of products that would show the "most growth" for the years 1981 and 1982.

Twenty-one percent of the buyers saw patio products as the fastest growing line and 20 percent saw power equipment as the fastest growing during the two-year period. (See table 1.)

Forty-three percent of the buyers for the auto supply chains and 40 percent of those for the national department stores saw outdoor power equipment as the best growth line. Buyers for the traditional department stores were most optimistic about upcoming sales of patio and outdoor living products – with 38 percent of these buyers naming these lines as their most-growth area; 34 percent of the discount store buyers expected most growth here, too.

Evaluating all the products

Looking at the product lines – nursery stock through energy products – it can be seen how the various types of multi-department stores rank growth possibilities. It can be seen that the discount stores and supermarkets place their highest expectations in nursery stock (including plants, seed, indoor plants and all green goods).

In both of these types of retail outlets, about one-third of the buyers expected the nursery products to show the most growth. One out of five of the drug store buyers saw green goods as the best growth area.

Discount stores, variety stores and supermarkets showed higher expectations of increasing sales of garden tools than did the other types of retailers included in this survey.

In looking for growth lines, the variety store and the drug store buyers also ranked patio and outdoor living products as the best choice for the two-year period.

None of the respondents expected notable growth of sales on snow removal equipment.

Not hot on hand-held power

In the category of hand-held power equipment (spin trimmers and power blowers, shrub and hedge trimmers are in this category) the buyers for the auto supply stores proved to be the most bullish with 19 percent of them looking for best growth here. It was noted that the auto supply store buyers also looked for best growth in other OPE lines.

Watering equipment, which is handled by at least 80 percent of

continued...

Table 2 Important factors in taking on a product

	All Stores %*	National %*	Tradi-tional %*	Discount %*	Variety %*	Super-market %*	Drug Store %*	Auto Supply %*
Proved consumer acceptance	59	52	43	58	70	61	61	65
Profit margin	29	16	35	28	30	21	33	29
Reputation of manufacturer	26	28	45	14	19	14	31	31
National brand name	19	16	33	19	22	18	11	16
Production/delivery capabilities	14	12	25	18	11	14	8	9
National advertising	12	4	18	10	11	29	19	7
Co-op ad program	11	...	23	10	8	11	8	13
Packaging	8	12	3	11	11	11	11	1
POP displays	6	8	10	6	11	...	6	3
Other	5	12	...	3	8	4	...	7

*Adds to more than 100.0% due to multiple responses.

Table 3
Number of years buying lawn and garden products for company

	All Stores %	National %	Tradi-tional %	Discount %	Variety %	Super-market %	Drug Store %	Auto Supply %
1 year	5	12	10	6	5	...	...	1
2 to 4	15	16	18	20	11	36	8	5
5 to 9	22	20	23	32	19	14	22	16
10 to 14	17	12	18	14	19	14	14	21
15 to 24	23	24	18	17	24	18	42	29
25 years or more	15	16	13	5	16	18	11	25
Median (years)	12	11	10	8	13	10	16	17

Source: LGM Survey, 1981.

Volume buyers' view

...continued

lawn and garden products retailers, was not seen as a big growth category by a significant number of the respondents in this survey.

Fourteen percent of the drug store buyers and 12 percent of the discount store buyers saw garden chemicals as a best growth line. Looking at fertilizer, 12 percent of the national department store buyers and 11 percent of the supermarkets saw this product line at the top, from a growth standpoint.

Few of the buyer types saw soil amendments (peat moss, gypsum, etc.) on a fast growth track. It appears, however, that supermarkets may continue to expand their offerings of the very broad category called garden supplies (11 percent saw this as best growth) and of indoor plant accessories.

Energy products: a new beacon

Energy products, which include the new generation of wood stoves and kerosene stoves, seem to offer a new beacon of sales opportunities for significant numbers of these buyers. Almost one out of four of the national department store buyers saw energy products as their best growth potential; 17 percent of the drug store buyers, 15 percent of the auto supply buyers and 14 percent of the discount store buyers were looking to the energy lines as leading in sales volume increase.

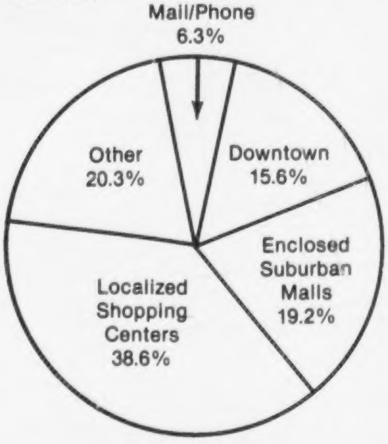
Of all the multi-department store buyers it was only among the variety store buyers that a significant number (16 percent) saw the gifts and holiday decor products as best possibilities for sales growth.

Other data from this survey show the buyers' ranking of the importance of various factors when considering taking on a new product (Table 2) and the buyers' tenure in their current positions (Table 3).

Consumer acceptance outranked all the other factors by far in the buyers' evaluations, followed by these other top-ranking considerations: profit margin, reputation of the manufacturer and national brand name. ☐

Place of purchase data

■Hardgoods items are purchased more frequently at localized shopping centers (all surburban shopping centers that are not enclosed regional malls) than at any other location.



All Hardgoods

This is one of the major conclusions reported in a recent study of Management Horizons, a marketing research and management consulting firm which specializes in retailing and consumer goods distribution. The study, **Locational Patterns for Hardgoods Purchasing,** was published for Management Horizons' clients as a part of the consulting firm's ongoing research program dealing with consumers' retail shopping behavior. For this study, hardgoods were grouped into three different categories:

- Leisure, recreation and hobby merchandise;
- Home furnishings and equipment;
- Hardware, lawn and garden and auto merchandise.

As reported by authors Sally Haviland and Tom Murnane, "Generally speaking, consumers purchase higher price-point hardgoods items in freestanding types of stores (discount stores, catalog showrooms, etc.) than in any other type of store." For instance, the average ticket amount of all hardgood items purchases made in freestanding types of stores was $63.84, whereas the ticket amount for these goods purchased in all locations averaged $48.36.

Age as factor

In examining specific demographic segments, the report stated that young adults (18-25 years of age) and older consumers (over the age of 65) make a significantly greater percentage of hardgoods purchases downtown than any other groups. This is supported by the fact that the 18-25 age group makes 21.3% of all their hardgoods purchases downtown, while the comparable figure for the over 65 age group was found to be 20.7%.

The Management Horizons study also found that men make a greater percentage of hardgoods purchases in freestanding types of stores than women. In fact, men make 25.4% of their hardgoods purchases in these types of stores, while the comparable figure for women is only 17.5%. Women tend to make more of their hardgood purchases in enclosed suburban malls and localized shopping centers than men. Specifically, women make 60.7% of all their hardgoods purchases in these two types of locations, while men make only 52.6%.

Data on income levels

Other findings in the study include: "Lower income consumers make a considerably greater percentage of their hardgoods purchases downtown than any other income group. The less-than-median-income group makes 21.0% of their hardgoods purchases downtown, while the median- to two-times-median-income group makes 12.8%. and the over-two-times-median-income group makes only 12.4%."

Management Horizons' RIS (Retail Intelligence System) is a unique and ongoing research program designed to help client companies respond to the challenge of:

- Ever changing consumer and competitive markets;
- Improving productivity strategy;
- New standards of corporate growth and profitability.

Clients are continually updated on trends, innovations, discoveries and developments in retailing through periodic publications.

FEEDBACK

Parts markup criticized

I am president of a small outdoor power equipment store in a suburb of Toledo, Ohio. We gross a little over $250,000.00 a year with our sales and service and have been in business eight years.

I would like to reach all the Presidents of companies like Toro, Ariens, Power Products, and Poulan/Weedeater, with a message from our business as a dealer of their product. I don't feel that a 40% markup on parts is enough for us to make a decent profit. In most cases that margin of markup has to include UPS charges or our labor and transportation to pick up the parts from a Distributor who is on the other side of town from us. The price lists that are furnished by the manufacturers are nearly all based on a 40% markup and are only a guide for us to use. It's hard to get our personnel to add 5% or 10% to a price every time we sell something over the counter or in the service shop. I would ask the manufacturers when they print the price lists to give us three columns (schedules) which would reflect 40%, 50%, and 60%. We could then direct our personnel to use whichever column (schedule) we felt would give us a decent return on our investment in their parts. I would like to reflect that other industries operate on greater margins than that. For example jewelry is sold at a 100% markup. I have enclosed a copy of a price list furnished us by one of our suppliers and is used by us for belts.*

OPEI should be a forum for ideas from dealers as well as manufacturers and I would like to know if you can help us with this suggestion? Your effort will be appreciated by all the dealers across the country.

Merle H. Smith
President
Mini-Engine, Inc.
Perrysburg, OH

*Editor's note: Mr. Smith enclosed price lists for wedge-type and V-type belts for lawn and garden equipment.

Table 1.
Outdoor Power Equipment Dealers
(Specialists in retailing lawn, garden and grounds-care equipment)

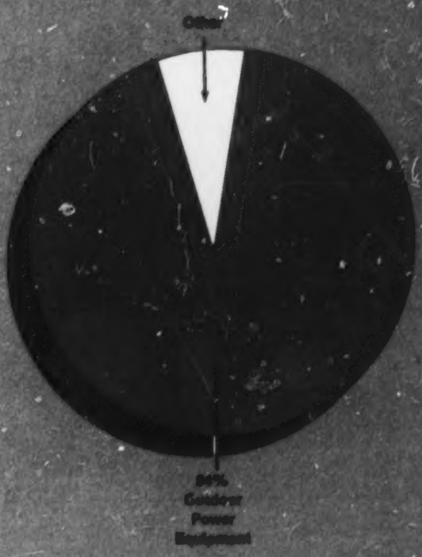
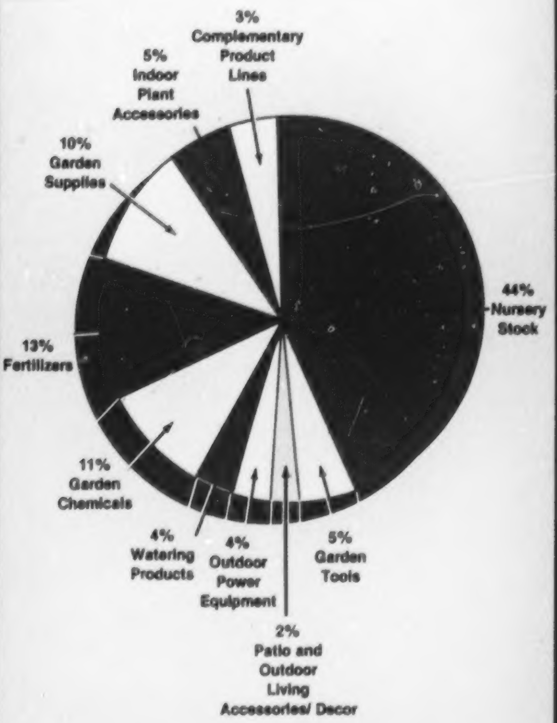


Table 2.
Garden Centers
(Full-line garden centers, retail nurseries)



Profile of lawn and garden retailers

Using sales volume from their product lines as a measure, this report shows an industry profile of four categories of retailers who handle lawn/garden/patio merchandise. The data are based on a *Lawn & Garden Marketing* survey.

■The almost total dependence by the outdoor power equipment specialty retailers on sales of this single line of merchandise has been documented anew in a survey completed by this publication. Survey data presented here show that 94 percent of their sales volume is from power equipment. (See Table 1.) Previous studies by **Lawn & Garden Marketing** showed this concentration of effort by the power equipment shops to be the rule in the mid-1970's. Despite early warning signals during those boom years that some equipment retailers needed to diversify, only a small percentage moved to take on non-power lines.

The retailing classification evolving out of the "green goods" category was able to diversify more readily. (See Table 2, Garden Centers.) The retailers under this retailing classification evolved from the retail nursery segment of the industry and were able to move more easily into selling chemicals, fertilizers, garden supplies, tools, etc. These lines proved to be good tie-in sales items to go along with the highly profitable nursery stock.

Comparing lawn and garden offerings

Despite some diversification it is apparent, however, that the income for retailers classified as "garden centers" is dependent to a great extent on sales of green goods, and that this retail segment remains vulnerable to changes in the marketplace which might be brought

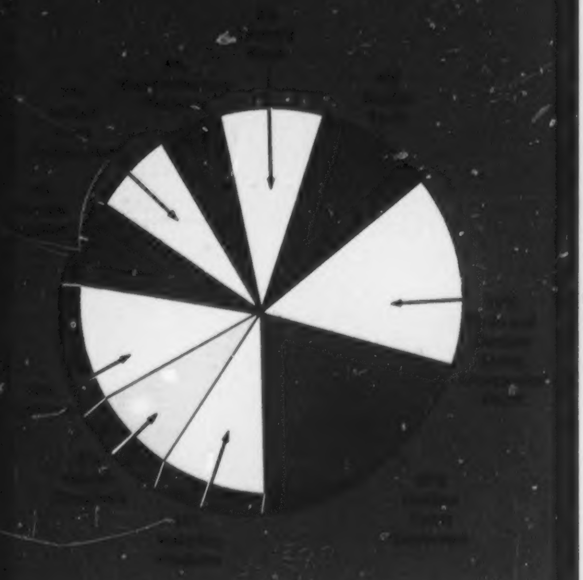
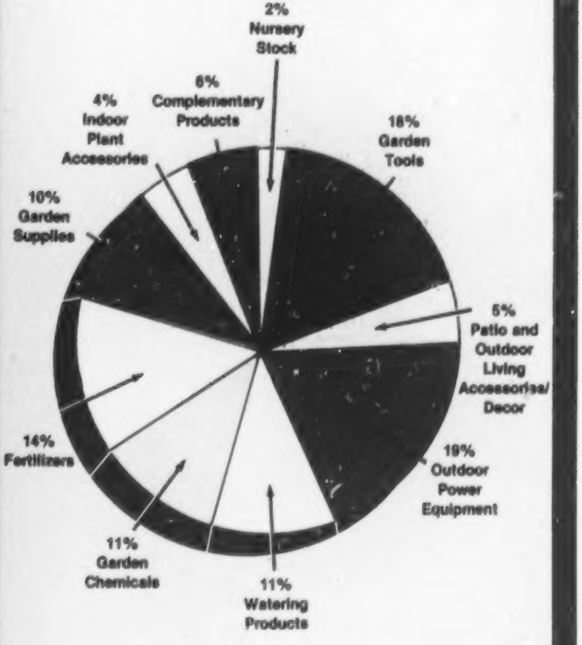


Table 4.
Hardware/Home Centers

(Hardware stores, Home centers, building supply/lumber stores)



on by weather, competitive pricing and shifts in consumer needs and preferences.

The multi-department stores—Sears, Montgomery Ward, J. C. Penney, TG&Y, K-Mart, Woolco, Woolworth, etc.—overall, have the most balanced offering of lawn, garden and patio lines, judging from this study.

The Hardware/Home Centers also have a diverse offering. Other sources and studies indicate that this type of retailer—a relative newcomer—is surpassing all others in rate of growth. These retailers with roots in, and input from, both the traditional hardware store and from the lumber and building supply store, have moved easily into these categories: garden tools, garden hose, accessories and other watering equipment items, barbecue grills, redwood and other wooden outdoor furniture, and decor. These are all fast-growing product lines.

Will the specialists diversify?

The specialization of efforts in merchandising some product lines has proved successful in certain areas for

continued...

Definition of 10 Product Groups

Nursery Stock—Trees, shrubs, ground covers, bedding plants, indoor plants, sod, seeds, bulbs, etc.

Garden Tools (non-power)—Shovels, rakes, cultivators, shears, edgers, sprayers, garden carts, wheelbarrows, spreaders, etc.

Patio and Outdoor Living Accessories/Decor—Outdoor cookery, lighting, trellises, patio furniture, fountains, pools, bug killers, bird houses/feeders, etc.

Outdoor Power Equipment—Mowers, tractors, snow removal equipment, tillers, trimmers, edgers, shredders, chain saws, log splitters, spin trimmers, etc.

Watering Products—Hose, sprinklers, nozzles, hose reels, irrigation systems/components, timers, drip irrigation products, etc.

Garden Chemicals—Pesticides, fungicides, herbicides, insecticides, etc.

Fertilizers—Organic and inorganic plant foods for lawn and garden

Garden Supplies—Mulches, soil amendments, bird seed, edging, gloves, stakes, ties, landscape chips, fencing, etc.

Indoor Plant Accessories—Potting soils, planters, plant food/chemicals, indoor lights, etc.

Complementary Products—Wood-burning stoves, fireplace accessories, pet supplies, mopeds, Christmas/holiday decor, etc.

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Circle (26) on Reply Card

Proven control of Gypsy Moth with Eaton Burlap

1 Cut a piece approx. 18" wide by long enough to encircle tree trunk.

2 Tie the burlap to the tree with twine or wire.

3 Fold top half of the burlap down over lower half to provide a shelter area for the caterpillars.

4 Remove and destroy the caterpillars each day — replace burlap around the tree and repeat process.

Write
EATON BROTHERS CORP.
P.O. Box 60
Hamburg, New York 14075

Circle (27) on Reply Card

PEOPLE ON THE MOVE

Don Newhart has been named product manager for Acme Lawn and Garden Products, PBI/Gordon Corp.

Jim Forbes has been named national sales manager of the Weber-Stephen Products Co., Arlington Heights, Ill. **William Eby** replaces him as sales manager for the company's western territory.

Sydney C. Myers has been appointed national accounts sales manager for Charmglow Products, a division of Beatrice Foods Co.

Thomas J. Lesnett has been named marketing manager and **Edward J. Washburn** has been appointed as sales manager for the Stull Co., Coraopolis, Pa.

Dan Bush has been promoted to national sales manager for McCulloch Corp., Los Angeles, Calif.

Dudley Moss, Chicago, Ill., has been appointed to the newly created position of Midwest region manager for Dexol Industries.

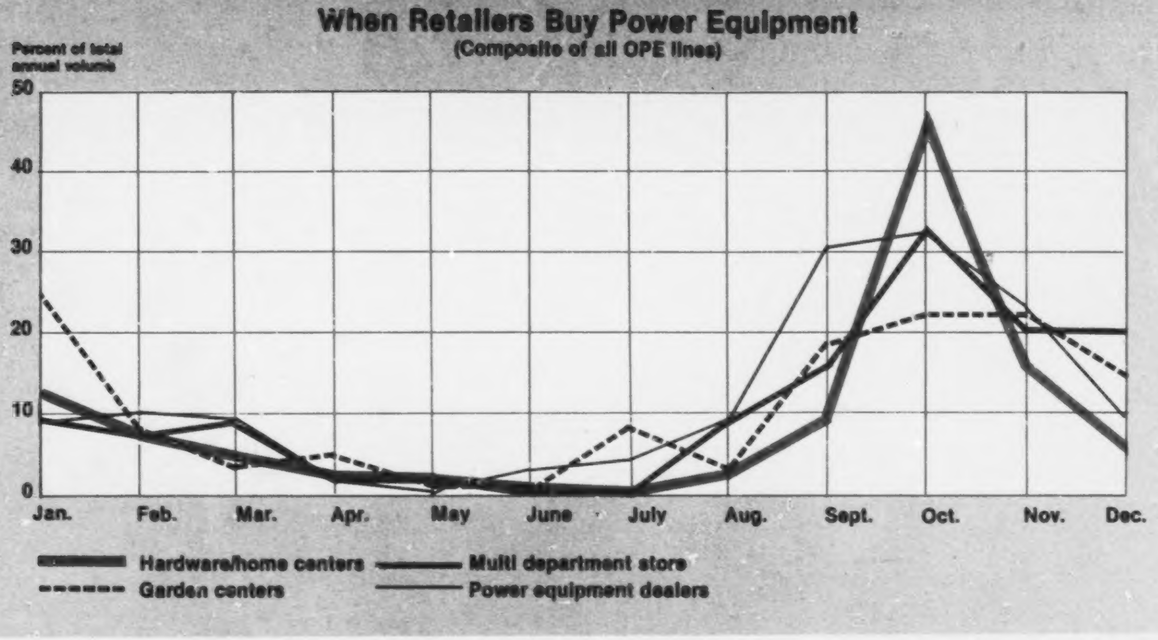
Profile ...continued

some product lines. There will be some strong specialty retailers in the lawn and garden industry who will continue to thrive. But current trends in consumer buying habits and marketing trends in the U. S. indicate that in order to survive, those retailers represented in Table 1 will, in the future, show less than 94 percent of sales volume in outdoor power equipment. And the retailers represented in Table 2 will probably show increased volume in watering equipment, tools and other lawn and garden lines as well as complementary product lines.

If the hardware/home center retailers continue to expand in numbers, and to take on related product lines, the tables in future years may indicate some increase in the percentage of nursery stock as a share of total lawn and garden sales volume in the hardware/home centers.

Will the specialty retailers change? There is an apparent need for specialty power equipment retailers. Some of those surviving the current crisis in that segment of the industry may continue to be highly specialized. Others in that category may remain primarily in power products but add other lines to ease problems of seasonality, climatic changes, and changes in consumer demands.

There are some excellent examples of garden center diversification around the country. Tables of data in the future may show less dependence on green goods. The number of strong, diversified garden centers will probably remain stable, or increase slowly. ☐



When Retailers Buy Power Equipment

(Composite of all OPE lines)

A new goal of retailers?

Smoothing the peaks in the purchasing cycle

Discussed here are some factors that might affect the purchasing calendar of major classes of lawn and garden products. The tables contain previously unpublished data from *Lawn & Garden Marketing's* 1980 survey of retailers. In addition to the table above, there are 12 tables on the following pages showing data on specific product categories.

LAWN & GARDEN

Hardware/home centers, with total number of stores surpassing other categories handling lawn and garden merchandise, are altering the peaks and valleys in the retailer purchasing cycle.

■Minimizing the dips in the *sales curve* has always been a big concern of lawn and garden retailers. They have been moderately successful in the past 10 years in their goals of reducing the peaks and valleys by adding product lines and by promoting earlier—and later—in the season.

Now it appears that many have targeted in on reducing the peaks in the *purchasing cycle*. It is a strategy reportedly being practiced by an increasing number of retailers in the current sell-in season. Will this strategy pass once the prime interest rates have dropped from the record-high levels of recent months?

Manufacturers report optimism for 1982 sales volume following a relatively good 1981 season for many product categories. But they report that more retailers are delaying purchase and delivery dates. At the recent big fall show held in **Detroit by ACE Hardware, it was** noted that more Ace members were deciding to forego the better discounts and drop shipments for the option to take delivery out of Ace warehouses.

The retailers who classify themselves as hardware stores or home centers, with membership in Ace, Cotter, HWI, etc., have enjoyed some advantage from the standpoint of being able to tailor buying cycles more closely to their needs. Data presented here shows the differences in the purchasing cycles of hardware/home centers and three other types of retailers.

Will more independent garden centers and power equipment dealers align themselves with the buying co-ops and other big organizations for better buying terms and other management assistance? A few garden centers have done this. A power equipment dealer described the difference that his recent association with Gamble's has meant. "I can now get two or three Lawn Boys at a time, at a better discount than I could get with

continued...

Smoothing the peaks

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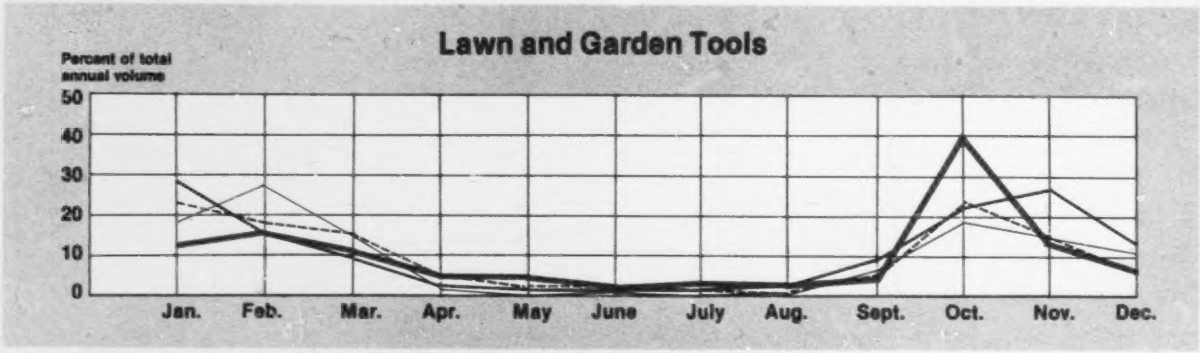

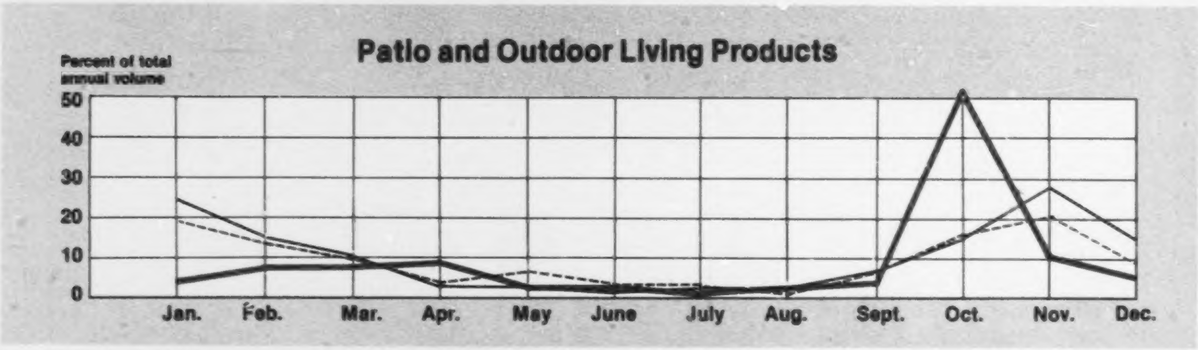

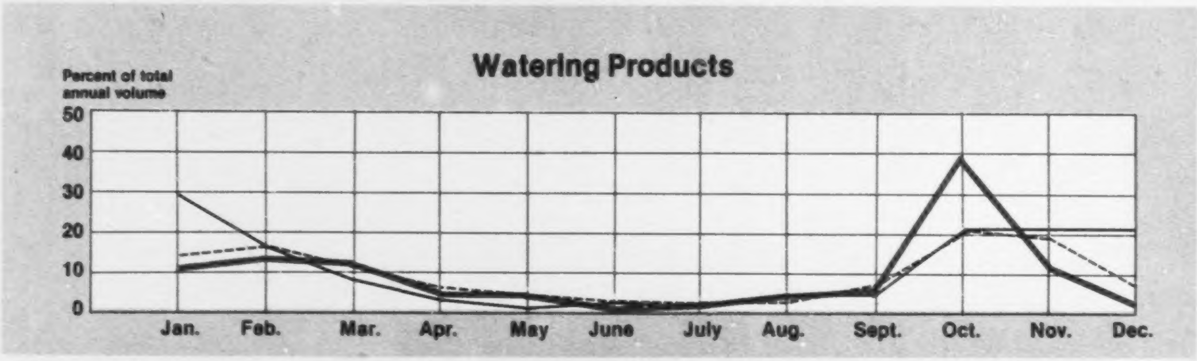

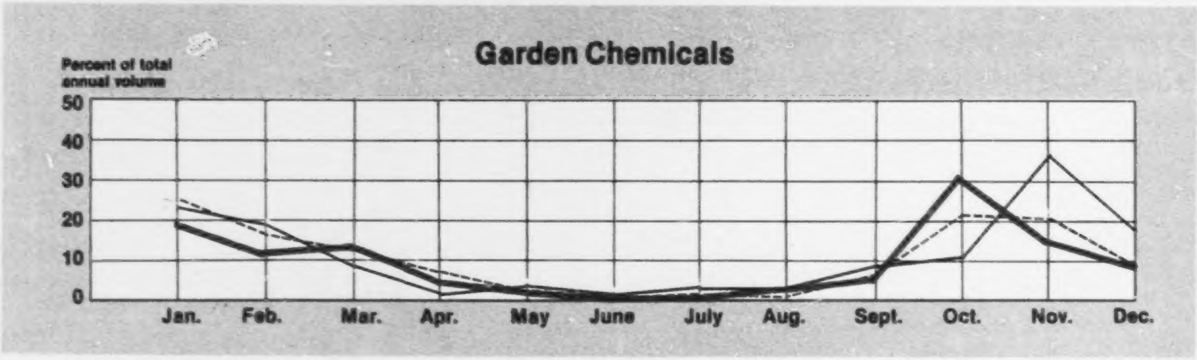

my volume purchases and early order discount through my Lawn Boy distributor." He also broadened his entire line and became a Gamble garden center.

Can manufacturers adjust their schedules to modify the peaks in purchasing cycles and lessen early commitment by the retail segment? At least one lawn and garden manufacturer theorized that it might be necessary for manufacturers to expand their production capacity to meet big orders from the retailing segment closer to the selling season.

Such a strategy would have to include an increased distribution capacity, also, he noted.

Does the question of smoothing the peaks in the purchasing cycle

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Smoothing the peaks

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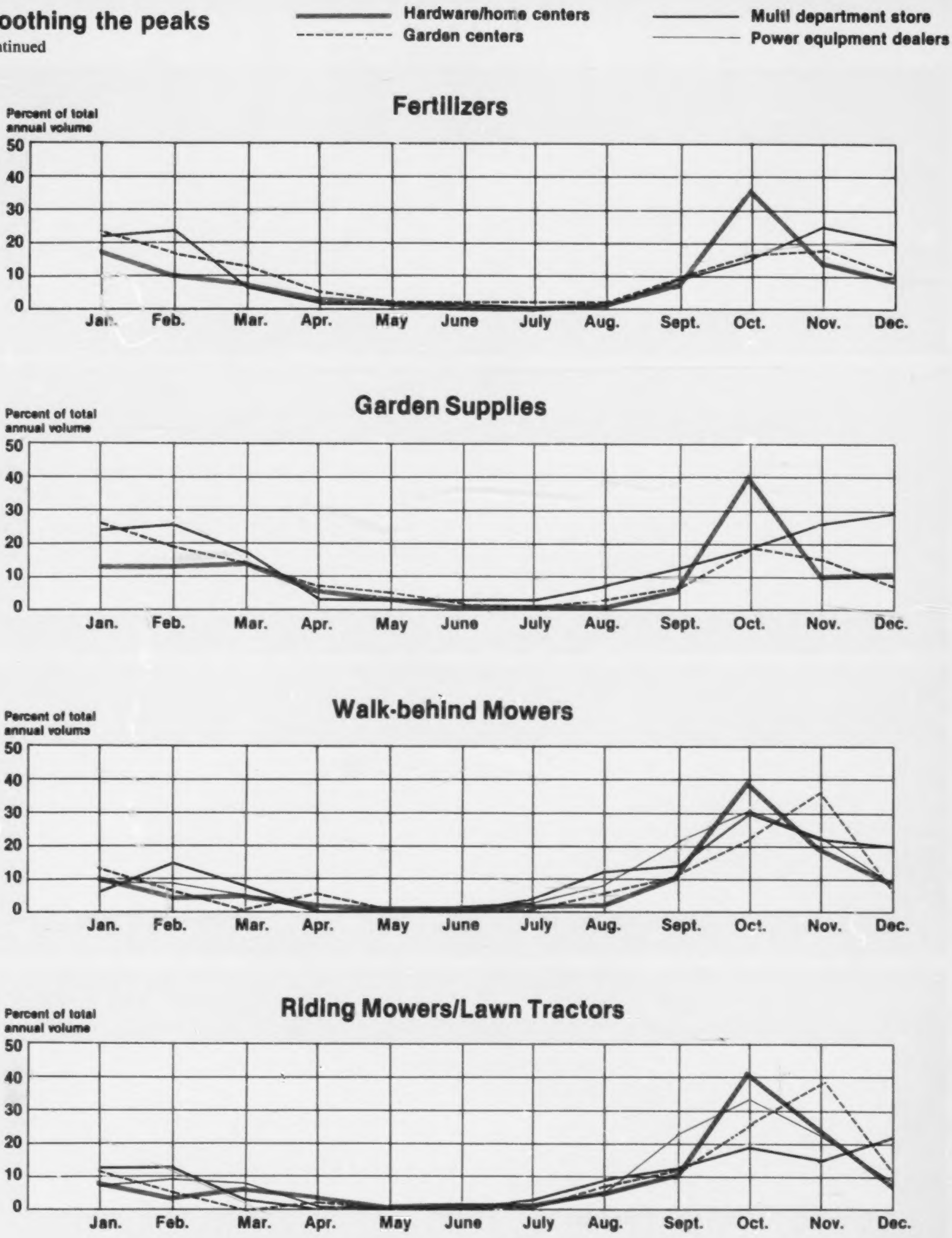


Fertilizers

Garden Supplies

Walk-behind Mowers

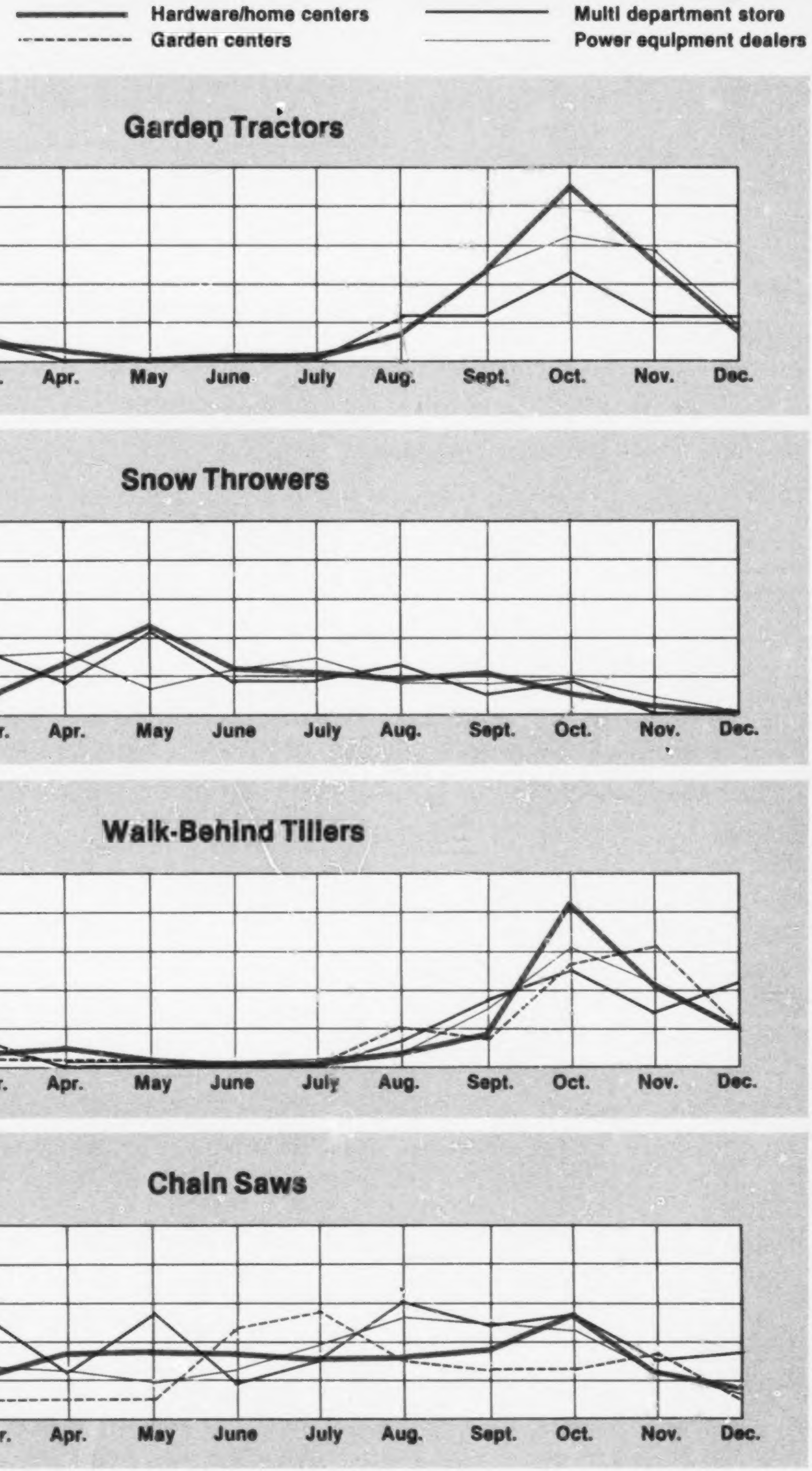
Riding Mowers/Lawn Tractors

revolve solely around the possibility of reducing interest rates to a more tolerable level? No. There are other considerations, including changes in demands for product categories. For example, there is more emphasis on patio and outdoor living products such as patio grills, furniture, bug lights. There is an increased interest in vegetable gardening.

The merchandising base is being expanded: more stores are selling lawn and garden products. The customer base is being expanded: more women are getting involved in making the buying decisions, reflecting the increased number of women who are wage earners and who are using some of their income for lawn and garden purchases. The

continued...

Smoothing the peaks..



increased population in the Sun Belt states with their longer growing season, and patio living/entertaining season, also is an influence.

Timing of introduction of merchandise in the marketplace also may alter the look of the lawn and garden retailers' purchasing calendar. The American Hardware Manufacturers Assn., which recently announced the opening of a new hardware show in Las Vegas in February, 1983, said the decision to open the new show was based in part on serving the demands of the western market. The AHMA sponsors the National Hardware Show held in Chicago in August, which has been considered the "opening page" of the buying calendar each season. Is the calendar changing? ☐

/ C 4725-2

NOVEMBER/DECEMBER, 1981

Lawn&Garden Marketing

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Beyond the chemical labels

More questions than answers?

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NOV./DEC. 1981 VOL. 20 No. 10 PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing

The merchandising magazine for lawn, garden and leisure living products

1982
BLADE BRAKE SYSTEM
WINNER

garden tools

8 **Beyond the chemical label.** Instruction from knowledgeable personnel is needed by novice gardeners, according to Ted Stamen, veteran horticulture/retailing educator.

15 **Sales surge to meet gypsy moth invasion.** Retailers report increased volume in control products as experts research various control methods. Data from Cornell University.

16 **Hard news and good vibes. LGM** reports on this fall's major shows that attracted heavy regional, national and international attendance to lawn and garden product exhibitions.

29 **Products and promotions for a 12-month season. LGM** reconstructs a monthly merchandising calendar to assist retailers in creating customer-links between peak selling seasons.

57 **Index of 1981 articles.** Feature articles published throughout the past year in **LGM** are listed chronologically.

DEPARTMENTS

2 **Editor's Notebook**
28 **Power Equipment Highlights**
60 **Product Briefs**
64 **Green Scene**
72 **Manufacturers' Literature**
76 **Calendar**
79 **Distributor News**

Coming in the January issue: Merchandising gardening products successfully to experienced, as well as those increasing numbers of first-time, home vegetable gardeners. Technical data and sales trends for tillers and garden tractors. An executive forum of widespread interest. OPEI will release their annual shipment data.

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12901, Overland Park, KS 66212-0930.

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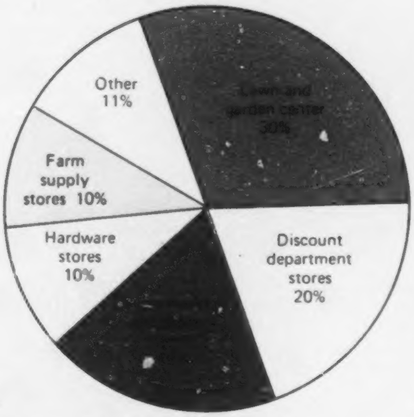
Beyond the chemical labels

More questions than answers?

A veteran horticulture/retailing educator, Ted Stamen, recently challenged a group of chemical formulators and distributors to take a close look at the "missing link" in educating the home gardener in the use of their products. We asked him to reconstruct the major concepts of his talk for this report. Stamen, as an urban horticulture advisor with the University of California Cooperative Extension Service at Riverside, has organized programs for the training of hundreds of retail horticultural sales personnel.

Fertilizer and pesticide distribution by type of retail outlet 1980 estimates

Percent of marketers' dollars



Source: C. H. Kline and Co.

■Let's make a visit to one of our local garden centers or home centers. After entering the front door, we will proceed to the lawn and garden chemical department. As we look around, we see item after item formulated to help customers solve lawn and garden problems. The shelves are well stocked with containers of insecticides to control insects, herbicides to control and eradicate weeds, fungicides for disease control and numerous other items to assist an ever-growing population of home gardeners.

In this lawn and garden chemical department, there is a missing link—the key to success for the consumer and for all those involved in the manufacturing and marketing of these excellent chemicals. What is it? Knowledgeable sales personnel. Salespeople with the expertise to diagnose consumer lawn and garden problems and to recommend the right treatment, ensuring positive and safe results.

The personal touch sought

It is my feeling that the manufacturers can have great point-of-purchase educational information, super descriptive labels and wonderful handout literature. But for many gardeners, especially first timers, that's not enough. They want and need the personal assistance of a knowledgeable sales person. This seems to be tied to the need for personal reassurance, someone to listen to the problem and, most of all, someone to instill confidence in that puzzled consumer.

continued...

At Ole's Home Center in California, a sales clerk examines the roots of a diseased plant, right, and at left, he interprets the instructions on the label.

Scotts
HOME / GARDEN

Rickel
Cashier
Cash & Checks
Charges

Even though there are many excellent retailers selling chemicals and doing a fine job, it is my contention that more than 50 percent of the retailers selling lawn and garden chemicals are doing so without one knowledgeable salesperson on their respective staffs.

All-out effort needed

I strongly feel an all-out effort needs to be undertaken to train retail sales personnel. Straightforward information given to consumers meets ethical standards, as well as being good business practice. From a financial aspect, straightforward answers will make money for retailers. Following is an actual example of this point, which I recently witnessed: a customer came into an excellent garden center and explained she wanted to control broadleaf weeds in her lawn. A well-trained sales person sold her the appropriate herbicide. The sale would have ended with a bottom line of $5. However, the sales person assisted the consumer by selling her a pre-emergent weed control for her flower beds, a sprayer for this purpose, a bottle of spreader-sticker and a pair of gloves. This add-on selling brought the total sale to over $100 and created a permanent customer who could go home and do the job with the proper equipment. Add-on selling opportunities develop all the time, therefore I am at a loss when I hear people in our wonderful industry say—I can't afford to train my sales personnel! Maybe the question should be: Can you afford *not* to train your personnel?

Distributor responsibility?

Recently I had the opportunity to speak to a group of distributors and formulators from all over the United States. The thoughts they expressed represented the thinking of many people in the lawn and garden industry. I suggested that distributors have a responsibility to train lawn and garden sales personnel. In fact, this is done quite commonly by progressive distributors in California. Many of those in the audience said they don't have time to perform this role. Well, who has the responsibility to train retail sales personnel? I don't have the answer to this perplexing question. However, I think we should take the time now to study it.

How errors boomerang

First and foremost, everyone in the industry loses when an untrained person gives poor information or a consumer misuses a chemical. It doesn't matter who is at fault. One turned-off customer can negatively influence 35 to 50 other potential or active gardeners in a negative way. Bad news travels fast. However, it is difficult to place your finger on how many people get discouraged and drop out of gardening each year. In most cases, these are the people who had unfavorable results for one reason or another. One thing you can be sure of: these ex-gardeners are not enthusiastic supporters of lawn and gardening activities. This is especially true for those who misuse backyard chemicals by killing or damaging their favorite trees, shrubs or lawns. It seems they can't talk about this depressing subject enough. Many of these problems could be prevented if employees who deal with lawn and garden consumers were trained.

Two strategies for training

Those who do work at training their sales personnel usually use one of the following strategies: Top retailers conduct their own training; in most cases this is done on a weekly basis. The managers may do the training themselves, or use their own employees or use supplier sales representatives. The training will deal with marketing, merchandis-

continued...

Beyond the label ...continued

ing, sales and plant culture aspects dealing with insects, diseases, planting, fertilizing, etc. Other retailers will conduct sporadic training sessions mainly by using supplier sales representatives. Bedding plant sales representatives know more about bedding plants than others; the fertilizer salesman knows his product best, and so on. Also, one doesn't pay a direct fee for this service.

One solution: moonlighters

I would like to suggest another way to obtain excellent teachers to train retail sales personnel. What I want to see is a combination of using supplier representatives, key retail employees who have a specific assignment and third party experts. I feel that some of the most talented people in the business are moonlighters, semi-retired or retired people. All of these folks would love to be involved in doing training if you give them time to prepare, give them a specific assignment and pay them a fair wage. Who am I speaking about when I say third party? I am thinking about the retired agriculture inspectors and entomologists who spent the better part of their lives dealing with ornamental plants. Others are retired or moonlighting junior college or college entomologists or horticulturists, suppliers' fieldmen or sales representatives. The selected person should have personality, technical knowledge, and teaching ability to be a first class trainer.

Subject areas listed

More training needs to be directed toward lawn care, soils, insects and disease control, and other related subjects. These are the areas in which consumers are looking for more help. Other sales aspects deal with sales and marketing. Training now being conducted is product-oriented rather than problem-oriented . This is only natural, as the fertilizer salesman wants to talk about *his* product. It would be advisable to direct the teaching or training toward the subject matter and at the same time bring in sales aspects. For instance, when talking on planting a new lawn from seed or sod, the trainer should deal with potential sales opportunities for tools, soil amendments, fertilizer and other necessary items. Many times the technically trained people lack a flair for this aspect. But there are many professionals who are capable of being good teachers or trainers and can do the job. The dollars spent for this service can be returned many times in increased sales.

Managing insect invasions

Let's change topics. Are you prepared to take advantage of a horticulture epidemic? Nature can be a financial ally. Opportunities for increased sales often present themselves and are rarely taken advantage of. These epidemic opportunities for increased sales may be on a local, regional or national level. However, they will fly by if one doesn't recognize them and have the management capacity to do something about them. Recently a small town I know of had an outbreak of fleas. The local garden center did a great service to the community by discussing the problems on a popular radio program. It also discussed the problem and its solution in advertising scheduled for a weekend.

Sales increased $15,000

The owner also printed handout literature on this subject and made it available in his store. All his educational information dealt with the problem and its control. He discussed how to spray for fleas, what materials to use and other details. This promotion resulted in an increase of gross chemicals sales of over $15,000. Ask yourself, are you capable of recognizing and actively putting an immediate sales campaign together to help the public and yourself if this type of opportunity comes your way?

These epidemic sales opportunities are happening all the time. We can see them with the gypsy moth problem, medfly, fruit fly, and crabgrass. All these and others represent real opportunities—especially for retailers with trained sales personnel. □

An article about the gypsy moth is on page 15.

See these people for Vapam:

ASGROW FLORIDA CO.
P.O. Box Drawer D
Plant City, FL 33566

BARZEN OF MINNEAPOLIS INC.
455 Harrison Street N.E.
Minneapolis, MN 55440

BLACK LEAF PRODUCTS CO.
667 North State Street
P.O. Box 418
Elgin, IL 60120

BONIDE CHEMICAL CO. INC.
11 Wurz Avenue
Yorkville, NY 13495

CALIFORNIA LIQUID FERTILIZER CO.
Bin 50 Arroyo Annex
755 S. Raymond Avenue
Pasadena, CA 91105

SUNNILAND CORP.
P.O. Box 1697
Sanford, FL 32771

CHIPMAN CHEMICALS LTD.
400 Jones Rd., PO Box 9100
Stoney Creek, Ontario
Canada L8G-3Z1

DEXOL INDUSTRIES
1450 West 228th Street
Torrance, CA 90501

ESTECH GENERAL CHEMICALS CORP.
30 North LaSalle Street
Chicago, IL 60602

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Edgewater, NJ 07020

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San Antonio, TX 78217

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Carson, CA 90745

CHAS. H. LILLY CO.
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Portland, OR 97218

SCIENCE PRODUCTS
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Chicago, IL 60646

SOUTHERN AGRICULTURAL INSECTICIDES INC.
P.O. Box 218
Palmetto, FL 33561

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Fort Valley, GA 31030

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Lawn&Garden Marketing

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JANUARY 1982 VOL. 21 No. 1 PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing

The merchandising magazine for lawn, garden and leisure living products.

8 Power for big gardens. LGM reports trends in power equipment and attachments as reflected in suppliers' and retailers' comments.

20 Creating a vegetable garden boom. One garden center's strategies fan the demand by making it easier and more interesting to garden.

29 New acquisitions, expansions, consolidations show industry trends. Regrouping, reinforced by aggressive advertising and marketing, has paid off.

34 Why's and how's of home gardening trends. LGM presents several of the more compelling forces behind the new interest in growing vegetables.

38 Are chains outgrowing cookie-cutter expansion strategies? Charles G. Gifford, president of Retail Marketing Services Inc., analyzes today's techniques in developing multi-store operations.

DEPARTMENTS

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17 Book Reviews
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53 Manufacturers' Literature
56 People on the Move
58 Calendar

Coming in the February issue: SELLING TURF PRODUCTS – A retailer's comprehensive guide on technical and marketing aspects of products used for improving home lawns: seed, chemicals, fertilizer, soil conditioners and application equipment (sprayers and spreaders).

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12901, Overland Park, KS 66212-0930.

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INTERTEC PUBLISHING CORP.

Power Equipment Highlights

Vol. 3 No. 1 January 1982

Excerpt from Chairman Steort's address to OPEI

In her address to the Outdoor Power Equipment Institute, Nancy Steorts, chairman of the U.S. Consumer Product Safety Commission, complimented members for their efforts in working with CPSC staff in developing voluntary safety standards. Pointing out that CPSC expertise and data are available to the OPEI, Chairman Steorts concluded by stressing an anticipation of "mutually beneficial effective programs which will in the final analysis benefit the American consumer."

NESDA is off and running

During three days of meetings in November in Seven Springs, Penn., the National Equipment-Servicing Dealers' Assn. resolved an ambitious agenda "in complete harmony." Twelve of the 13 NESDA board members were present or represented, each contributing from a background of experience in state and regional dealers' associations: Norman Beck, chairman, N.Y.; Thomas Burger, Mich.; Larry Cradler, Ohio; Wayne Todt, alternate, Ohio; Barbara Curtis, Calif.; H. N. Mullins, Ala.; Clarence Myers, Fla.; Vernon Uhlinger, MEDA alternate for Lillian Nadeau, Mass.; Jerome Novekosky, treasurer, Penn.; David Parke, Calif.; Leonard Shetler, Ohio; Kyrle Wm. Preis, replacing Don Wenger, Md.; Wilb Westermann, Ill. Absent: Elaine Foltynwicz, no alternate, Ill.

Join directly or through association

NESDA members soon will receive packets of information for their use and to use in recruitment of other servicing dealers into a nationwide network. Being compiled are copies of the NESDA constitution, the statement of NESDA positions on issues, brochures outlining NFPEDA insurance benefits and services for NESDA members, a roster of regional affiliates and other pertinent information. NESDA dues should be $20 per year, payable directly or through regional associations. Information packets will be mailed to members when their applications and dues are received.

First step

A brochure spelling out NESDA's aims in suggesting reasonable solutions for problems is immediately available. For this brochure and for information about membership, send name, address and $3.50 to NESDA, East Main Street, P.O. Box 121, Jefferson Valley, NY 10535, (914) 245-5678. (This money will be used to defray costs of printing and postage; NESDA does not yet have a formal income source).

As voted, the next meeting of the board of directors will be handled via conference call.

OPEDA sponsors seminar for dealers

One of the forces spurring OPEDA to sponsor a retailing-dealer management training seminar has been the rise in numbers of bankruptcies. The *Wall Street Journal* recently wrote of a 32 percent average increase in bankruptcies filed. Dun and Bradstreet reported a 42 percent rise, just in commercial and industrial areas. A specialist from Bank of America predicts that retailing failures will increase significantly.

To help dealers forestall financial failure by sharpening their management skills, the consulting firm, Ar-Jay Enterprises, has developed a one-day, concentrated no-frills seminar. Ralph V. Jenkins, Ar-Jay president, brings over thirty five years' experience in the wholesale-retail sales marketing field to this endeavor.

Available through OPEDA distributors

The retailing-dealer management training seminar is available to power equipment dealers only through their OPEDA distributors. Distributors will benefit if their dealerships stay alive and well because their trained dealers can cope with marketing challenges of the '80s. In view of the quality of the training to be offered, this seminar is highly recommended by the OPEDA organization.

Dealer Development Seminar Highlights
- Introduction to small business management
- Basic practical principles of retail management
- Steps necessary for successful small business management
- Evaluation and analysis of your current business

Briggs & Stratton has new electric motor

Briggs & Stratton has developed and will manufacture an electric motor suitable for a variety of applications, including lawnmowers. It can be braked readily to meet the CPSC 3-second blade-stopping requirement.

Uses a two-conductor cord

The new motor is a 120-volt, double insulated, direct drive, 4-pole permanent magnet type, rated at 1,000 watts. Designed to meet the double insulation requirements of governing safety laboratories in the United States and Canada, it requires only a two-conductor cord. The motor may be connected to normal, 60-cycle, 120-volt household current through a 100-foot, 16-AWH extension cord.

MARK YOUR CALENDAR
OPEDA Feb. 17, 18, 19

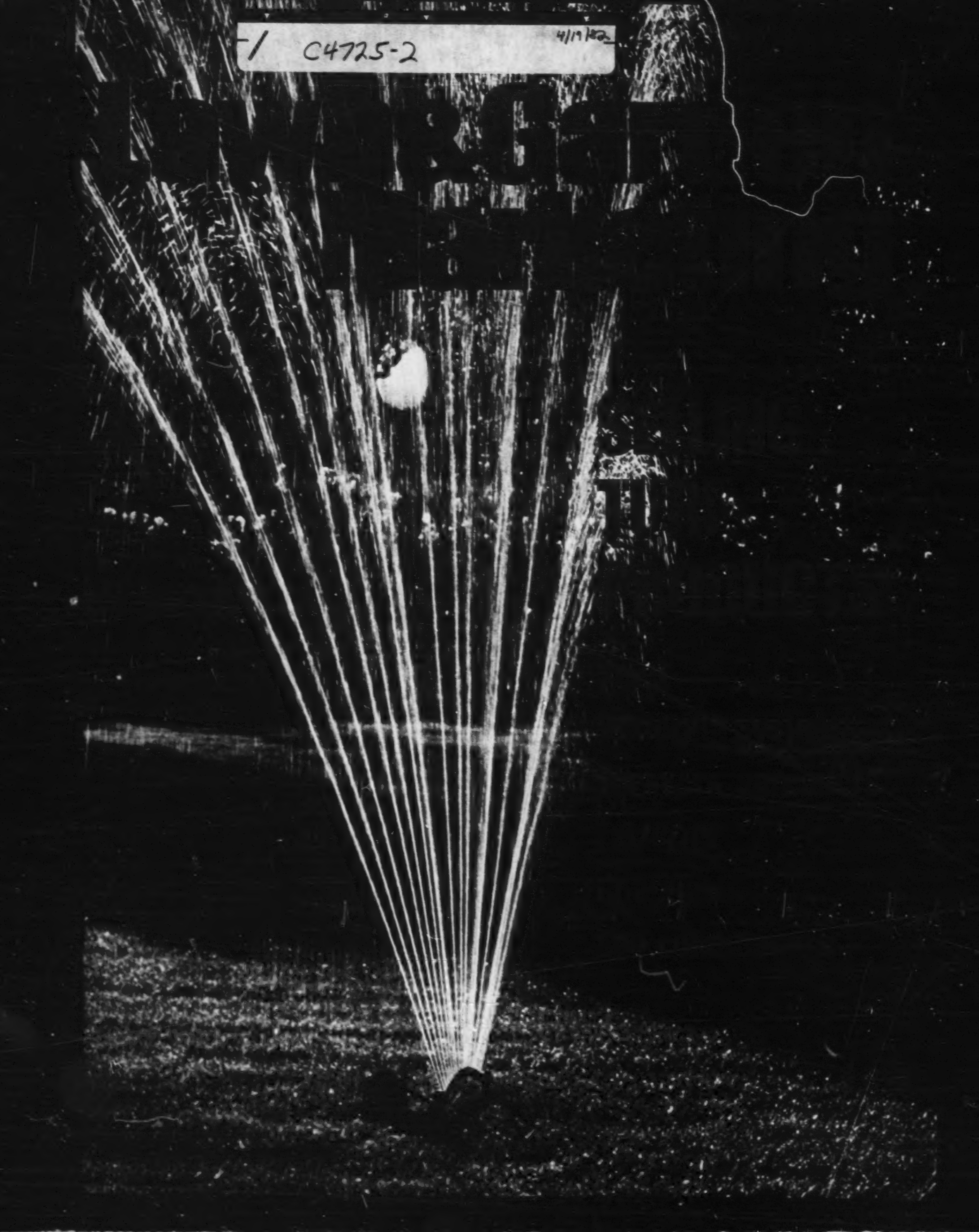
Second annual convention, Miami, Florida.

OPEI reports key lawn and garden shipments

Product	Unit shipments 1981	Unit shipments 1980	Change %	F.O.B. shipment value 1981	F.O.B. shipment value 1980	Change %
Walk-behind power mowers	4,600,000	5,700,000	-19.3%	$ 606 MM	$ 701 MM	-13.6%
Lawn tractors/riding mowers	620,000	808,000	-23.3%	453 MM	530 MM	-14.5%
Riding garden tractors	151,000	220,000	-31.4%	266 MM	351 MM	-24.2%
Rotary tillers	501,000	667,000	-24.9%	138 MM	159 MM	-13.2%
	5,872,000	**7,395,000**	**-20.6%**	**$1,463 MM**	**$1,741 MM**	**-13.9%**

Source: Outdoor Power Equipment Institute

1981 model year, estimated



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FEBRUARY 1982 VOL. 21 NO. 2 PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing

The merchandising magazine for lawn, garden and leisure living products.

Lawn&Garden Marketing

4 Product movement report: autumn. In this second of a series, retailers report sales of eight autumn product lines.

Retailer's guide to selling turf products:

14 Fertilizers, chemicals, soil conditioners. This report describes the effects of inflation, the move to the Sun Belt and the impact of lawn service contractors on retailers. Also included: tables of data from Frost and Sullivan Inc. on the market for fertilizer and pesticides. By Wendall Burns.

16 Sorting out the confusing lawn seed picture. Seeds are described by type according to problems solved for climates and conditions. New U.S.-developed, improved turfgrass varieties result from the "breeders' rights" legislation, early 1970s. By Jerry Johnson.

24 Quality counts big with watering products. Manufacturers discuss trends, changes and strategies to expect in the 1982 market. By Marjorie Riggin.

32 Application equipment for chemicals, fertilizers, lime, seed...LGM provides information useful to sales personnel about spreaders, sprayers and other types of applicators.

DEPARTMENTS

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Coming in the March issue: Major advertising and promotion campaigns described. One article will describe how Florida Tractor Corp. is working with manufacturers and retailers to stimulate sales of outdoor power equipment in 1982. Another article will feature ad plans of manufacturers of selected high volume, problem-solving merchandise. Also: The many uses of mulches.

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Product Movement Report, Autumn, 1981

This quarterly feature provides data from retailers responding to a survey conducted by Lawn & Garden Marketing concerning sales in eight categories of autumn merchandise.

■Seven of the eight product categories in Product Movement Report for Autumn, 1981 reflected the economy in general: sales were down and holdover inventory was up over 1980. Fall bulbs were the only products showing an increase in sales volume. And that increase was substantial: 25 percent. One retailer responding to the survey said the increase in bulb sales was due to a more knowledgeable

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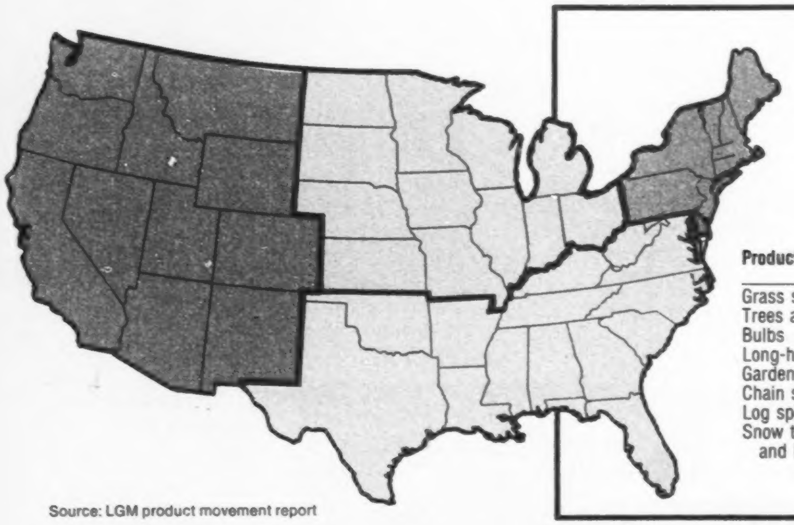

Source: LGM product movement report

NATIONAL

Product Category	Percent Change 1981 vs 1980 Sales	 1981 vs 1980 Inventory
Grass seed	−7.0	+8.0
Trees and shrubs	−12.4	+20.0
Bulbs	+25.3	+18.8
Long-handled tools	−9.5	+26.1
Garden carts/wheelbarrows	−30.7	+11.1
Chain saws	−21.2	+7.9
Log splitters	−36.0	−4.8
Snow throwers (Northeast and North Central only)	−25.0	0.0

WEST

Product Category	Percent Change 1981 vs 1980 Sales	 1981 vs 1980 Inventory
Grass seed	−37.5	+344.4
Trees and shrubs	+50.0	-0-
Bulbs	+16.7	-0-
Long-handled tools	−23.3	−15.3
Garden carts/wheelbarrows	+48.9	+39.7
Chain saws	−6.4	-0-
Log splitters	−150.0	−5.9
Snow throwers	NA	NA

NORTHEAST

Product Category	Percent Change 1981 vs 1980 Sales	 1981 vs 1980 Inventory
Grass seed	+50.0	−25.1
Trees and shrubs	−40.0	+400.0
Bulbs	+25.0	NA
Long-handled tools	+3.0	+28.3
Garden carts/wheelbarrows	-0-	−33.3
Chain saws	−4.8	+5.3
Log splitters	−30.0	−3.7
Snow throwers	−45.5	+5.6

NORTH CENTRAL

Product Category	Percent Change 1981 vs 1980 Sales	 1981 vs 1980 Inventory
Grass seed	+4.7	-0-
Trees and shrubs	−12.5	+400.0
Bulbs	-0-	+50.0
Long-handled tools	−4.4	−10.9
Garden carts/wheelbarrows	−20.0	+33.3
Chain saws	−35.4	+20.0
Log splitters	−39.3	−13.0
Snow throwers	−11.1	−5.4

SOUTH

Product Category	Percent Change 1981 vs 1980 Sales	 1981 vs 1980 Inventory
Grass seed	−40.0	+80.2
Trees and shrubs	−9.1	−22.2
Bulbs	+28.6	+24.5
Long-handled tools	−22.5	+40.8
Garden carts/wheelbarrows	−36.2	+22.5
Chain saws	−17.2	+6.0
Log splitters	−240.0	-0-
Snow throwers	*NA*	*NA*

continued...

public. Bulbs showed an increase in three of the major census regions: the Northeast, South and West. Only in the North Central states did sales of these product fail to show an increase.

The Northeast

Grass seed sales also fared well in the Northeast, showing an increase of 50 percent; there was a 25 percent decrease in holdover inventory by the reporting retailers. Long-handled tools showed a small increase in sales volume. The power equipment items, which in recent years have meant good dollar volume in the Northeast—chain saws, log splitters and snow throwers—trailed off this year, with sharp decreases from last year.

Retailers from the Northeast cited some of the reasons for good volume in sales of some products. People were looking for closeouts on lawn mowers and grills for Christmas. They were attracted by promotional prices on top seasonal items such as bamboo rakes and large leaf bags. Attachments for mowers for leaf pickup as well as other leaf cleanup equipment and accessories also moved well.

Favorable weather stimulated the sale of seed and fertilizer in the region.

Sale prices have been the "only approach" said some of the respondents. "We distributed two flyers in September and October of 1981 whereas we distributed only one flyer in 1980," said another respondent who reported a significant increase in volume of bulbs, grass seed, tools and garden carts. "We have had a decent fall season and we look forward to a banner spring season," said this retailer.

Another retailer, an independent, said the increased price is depressing sales of bulbs, with less unit volume each year. At the same time he credited good weather and sale prices with helping to move merchandise.

Another dealer said that even promotional prices did not spur sales. Customers were buying only what they needed, he lamented.

From Pennsylvania, a garden center manager reported that a statewide "Fall is for Planting" campaign, coupled with his firm's usual fall-planting push, helped to sustain sales. Bulbs, crafts and cut-flower sales were exceptionally good, but nursery stock and mulches were down. "Our competition forced us into an annual container clearance sale sooner than we'd have liked," he commented.

North Central states

The sales picture in the North Central states was even bleaker than in the Northeast. Heavy rains in some areas, and the general economy, kept the sales volume below last year's movement except for one product line—grass seed—which showed about a five percent increase for the region.

Some other sections of the North Central region, however, credited good grass seed weather and "reasonable" prices as stimulus for improved volume. One retailer reported excellent weather for seeding grass which offset the depression in housing starts in his trade territory.

"Our fall mail circular kept our sales up over last year," said a Minnesota retailer. For one Michigan retailer, the best increases were in fertilizer and lawn rakes, but the weather turned bad early and that, matched with the sluggish economy, prohibited any significant gains.

"Nothing could influence sales this fall due to the economic conditions. No ads helped," said an Illinois retailer.

A dealer who sold 78 snow throwers in 1979 and six in 1980 sold only two of the units in Fall, 1981. "No snows. Banana-belt temperatures," he explained. At the time of his response to the survey, he had 36 snow throwers still in inventory.

An Ohio dealer reported that "People going out of business were selling their chain saws at below dealer cost," hurting his sales volume.

A Wisconsin dealer complained of cut-rate competition, noting that his chain saw sales dropped from 125 in the fall of 1980 to 60 in the fall of 1981.

A consistent advertising campaign enabled an Ohio dealer to reduce his snow thrower and chain saw inventory. He sold 150 snow throwers in the fall of 1981, compared to 35 the previous fall. But, he still had 150 units in inventory. He increased chain saw sales from 20 units to 35 units in fall, 1981, but still had 120 on hand.

Unemployment frequently was cited by dealers, especially in Michigan, as the reason for reduced sales volume.

A big assist in their overall sales picture for many of the retailers in the North Central region was the demand for kerosene heaters.

The South

Despite reduced prices on grass seed, sales of this product line in the South were down 40 percent compared to autumn, 1980. Although many areas reported favorable weather, a Ft. Worth retailer said that heavy rains during the month of October hurt his sales. Several respondents from the South reported good sales of vegetable garden seeds. A North Carolina respondent reporting good garden and grass seed volume, also commented that "There was a bigger interest in bulbs this year, yet they were more expensive than ever."

A dry fall in Tennessee discouraged some planting. But one volume retailer there credited a special promotion on chain saws with increasing chain saw sales from 100 units in the fall of 1980 to 150 for the comparable period of 1981.

A home center in Georgia reported that the dry season helped move hose and other watering items off the shelves.

In Florida, a power equipment specialty retailer said that weather—little rain and an early cold spell—stopped growth of grass and resulted in poor sales of mowers. But Snapper's thatcherizer attachment attracted buyers to that brand of mowers. Sales of other mower lines did not meet his expectations, he said. Other Florida power equipment dealers noted a downturn in sales.

A Louisiana garden center operator reported that good weather, a good economy and aggressive advertising helped increase business.

Bedding plants and container stock produced exceptionally good

...continued

The "Best Seller" list

The following products were mentioned by retailers as having generated exceptionally good sales in the Fall, 1981 season.

Northeast

- Grass seed
- Bulbs
- Fertilizer
- Fall/winter fertilizer
- Pots
- Rakes
- Mulches
- Winter protection
- Burlap for winter protection
- Lawn mowers
- Lawn mower parts
- Bird feeders
- Chain saws
- Chain saw accessories
- Greenlawn Plus
- Log splitters
- Lime
- Shade trees
- Evergreens
- Hedge materials
- Large leaf bags
- Lawn and garden tractors
- Snapper mowers, accessories
- Riding mowers
- Wheelbarrows
- Tillers
- Mulching mowers
- Leaf blowers and vacs
- Jacobsen
- Homelite
- Hand mowers
- BBQ grills

North Central

- Grass seed
- Fertilizer
- Leaf blowers and vacs
- BBQ grills (Christmas gifts)
- Shade trees
- Shrubs and hedge
- Leaf bags
- Lawn and garden tractors
- Snapper mowers and accessories
- Riding mowers
- Wheelbarrows
- Bird feeders
- Chain saws
- Chain saw accessories
- Log splitters
- Garden hose
- String trimmers
- Carts
- Snow throwers
- Pesticides
- Lawn tractors/mowers
- Sod
- Axes and handles
- Top soil
- Sprinklers
- Lime
- Tillers
- Garden seed
- Potting soil
- Kerosene heaters
- D-Con
- Air-cooled engine parts
- Snowmobiles
- Dixon mowers
- Lawn-Boy mowers
- Snow blades

South

- Grass seed
- Bulbs
- Fertilizer
- Pots
- Mowers
- Rakes
- Mulches
- Tillers
- Leaf blowers and vacs
- Hand mowers
- Snapper mowers, accessories
- Riding mowers
- Fall fertilizer
- Chain saws
- Garden hose
- Chain saw accessories
- String trimmers
- Pesticides
- Lawn tractors/mowers
- Axes and handles
- Sprinklers
- Garden seed
- Potting soil
- Kerosene heaters
- Snow blades
- Bedding plants
- Splitting mauls and handles
- Wedges
- Files
- Soil conditioner
- Baled peat
- Vegetables
- Garden sprayers
- Soil testing
- House plants
- Service and repair
- Indoor plant food
- Hand tools
- Fertilizer spreaders

West

- Grass seed
- Bulbs
- Fertilizer
- Mowers
- Rakes
- Shade trees (seedlings)
- Shrubs, hedges
- Chain saws
- Garden hose
- String trimmers
- Pesticides
- Long handled tools
- Garden seed
- Kerosene heaters
- Snow shovels
- Bulb food
- Engines
- Loppers

Product movement

...continued

sales, but field-grown materials, fertilizer and chemicals did not come up to expectations, he said.

One retailer from Kentucky reported that sales were down 23 percent. Practically all merchandise in his garden center was down in sales, he said. The spring and summer sales also were "not great" due to a coal strike and May rains. He commented, however, "Our community has a diversified economy and should be relatively stable. I honestly believe the newspapers and TV create some slowdown in sales by their incessant doomsday headlines."

The West

In the West, sales of trees and shrubs were up to 50 percent, bulbs were up 17 percent and garden carts/wheelbarrows were up 49 percent. Grass seed sales were down 38 percent and sales of chain saws were down seven percent.

In the Seattle area, one company reported promoting fall fertilizers and seed more heavily than usual to compensate for the lack of installations of new lawns. Reseeding and improving old lawns did increase and helped to offset the loss of the new housing starts, but not enough to bring volume of seed sales up to the previous year. This dealer, however, did report exceptionally good sales of fall fertilizer, lime, gas weed trimmers, barbecues and accessories.

Another Seattle area retailer reported exceptionally good sales in lawn mowers. He noted, however, that the buyers were also shoppers. They had been into the store previously, beginning in June, and 80 percent of the sales were to customers who had been looking since June and returned to his store to buy. He had offered no special prices and attributed the success to providing quality equipment and serving customer needs. His chain saw sales were down, though. In some areas of Washington and Oregon, the retailers reported that the depressed "timber economy" has hurt them.

Respondents from California, with a few exceptions, reported sales were down and blamed the economy. ☐

Power Equipment Highlights

Vol. 3 No. 2 February 1982

OPEI reports across the board decline of key lawn and garden shipments

Historical Data (Revised) – 1980

Product	Unit Shipments 1980	Unit Shipments 1979	Change %	F.O.B. Shipment Value 1980	F.O.B. Shipment Value 1979	Change %
Walk-Behind Power Mowers	5,700,000	5,900,000	– 3.4%	$ 701 MM	$ 656 MM	+ 7.0%
Lawn Tractors/Riding Mowers	808,000	858,000	– 5.8%	530 MM	493 MM	+ 7.5%
Front Engine	494,000	515,000	– 4.1%	345 MM	311 MM	+10.9%
Rear Engine	314,000	343,000	– 8.5%	185 MM	182 MM	+ 1.6%
Riding Garden Tractors	220,000	254,000	–13.4%	351 MM	365 MM	– 3.8%
Rotary Tillers	667,000	571,300	+16.8%	159 MM	125 MM	+27.2%
	7,395,000	**7,583,000**	**– 2.5%**	**$1,741 MM**	**$1,639 MM**	**+ 6.2%**

Complete List of Key Lawn and Garden Shipments – 1981 Model Year (Estimated)

Product	Unit Shipments 1981	Unit Shipments 1980	Change %	F.O.B. Shipment Value 1981	F.O.B. Shipment Value 1980	Change %
Walk-Behind Power Mowers	4,600,000	5,700,000	–19.3%	$ 606 MM	$ 701 MM	–13.6%
Lawn Tractors/Riding Mowers	620,000	808,000	–23.3%	453 MM	530 MM	–14.5%
*Front Engine	370,000	494,000	–25.0%	291 MM	345 MM	–15.7%
*Rear Engine	250,000	314,000	–20.4%	162 MM	185 MM	–12.6%
Riding Garden Tractors	151,000	220,000	–31.4%	266 MM	351 MM	–24.2%
Rotary Tillers	501,000	667,000	–24.9%	138 MM	159 MM	–13.2%
	5,872,000	**7,395,000**	**–20.6%**	**$1,463 MM**	**$1,741 MM**	**–13.9%**

*Subtotals

Twelve-month shipments by reporting members of the Outdoor Power Equipment Institute statistical program declined 20.6 percent when compared with the same period in 1980.

The 4.6 million walk-behind power mowers shipped in 1981 compares with 5.7 million units in the 1980 model year. Factory values declined from $701 million to $606 million, or 13.6 percent.

Shipments of riding garden tractors declined 31.4 percent to 151,000 units having a F.O.B. value of $453 million. Last year's 220,000 units were valued at $605 million.

Estimated shipments of lawn tractors/riding mowers totalled 620,000 for the 1981 model year, down 23.3 percent from 1980. F.O.B. factory value also dropped to $453 million or 14.5 percent less than 1980 values.

Rotary tiller shipments were off 24.9 percent to 501,000 units, a decline of 166,000 units from the 667,000 shipped in 1980. Factory value decreased 13.2 percent from $159 million to $138 million.

The twelve-month across the board declines can be attributed in part to high interest rates and a decline in household spending. The twelve-month period began in September 1980 and ended Aug. 31, 1981. Companies participating in the OPEI statistical reporting program accounted for a vast majority of total industry shipments of the above products.

It's now *Snapper* P.E.

"Snapper Mac", the longtime symbol in outdoor power equipment, fulfilled the adage "If you think enough of something, you will put your name on it" by becoming part of the recently renamed Snapper Power Equipment.

"Our long-term sense of pride in Snapper has led us to rename McDonough Power Equipment, Snapper Power Equipment. Our new name will enhance our visibility and reaffirm our commitment to independent distributors and dealers, and customers", according to A. A. Malizia, chairman.

Snapper Power Equipment was founded in 1890 as Southern Saw Works. The company became McDonough Power Equipment with the 1956 relocation to McDonough, Ga. Snapper Power Equipment manufactures outdoor power equipment for all 50 states and 30 foreign countries.

Snowthrower sales snowball in Europe

Early October and November snows in Europe have resulted in a flurry of sales of American-built snowthrowers, according to the Simplicity Manufacturing Co. Simplicity is an Allis-Chalmers company.

Introducing line for heavy snow

G. Christopher Covert, manager, International Marketing, said that international sales of all Simplicity powered equipment have been rising steadily for the last five years. For this winter season, Simplicity introduced a new line of snowthrowers built specifically for European heavy, wet snow conditions. Especially popular has been the 10 horsepower model with an 80 centimeter (32 inch) clearing width, which also has seen limited distribution in the United States.

Greenview
Jet-Sped

Fertilizers, chemicals, soil conditioners

A big, important market that requires close management in 1982.

By Wendall Burns

■The consumable supplies for lawn maintenance—fertilizer, herbicides, insecticides, soil conditioners—comprise an important segment of the lawn and garden retail market and merit special attention by retailers this year.

Lawn care supplies continue to be the strong suit of the industry. Despite some tapering off of unit volume growth due to inflation, recession and the downturn in housing, the above-described bagged-and-bottled consumables are the bread-and-butter merchandise for most retailers of home horticulture products. Even so, this is an industry segment which needs careful grooming during these times of dramatic economic, social, political and marketing changes which are impacting the public. Home owners are re-evaluating how to invest their financial resources as well as their time. It is likely they will continue to view the care of their homes, including the lawn and exterior, with ever greater care; and they're buying and working smarter.

Effects of inflation

Retailers reported last year that their customers were more price-conscious, and that many would purchase a smaller bottle of herbicide or a less expensive bag of fertilizer than they would have in previous years. Likewise, because of high costs the trend to less vacation travelling continues. On the brighter side, this has resulted in customers' spending more time on lawn care, gardening and other DIY projects. This stretches out the lawn and garden season, although not adding much to total unit sales volume at the end of the season. Most of the volume retailers gear their merchandising strategies to getting the cream of the crop during the peak selling season. They base their inventory on sales in previous years, and stock only the high-turn items.

Some categories of do-it-yourselfers match their lawn feeding and herbicide application schedules to coincide with the price-promotions by the mass retailers. Others, who value their time more than the dollars saved on sales prices, turn to the specialty retailer, from whom they can get advice along with the basic fertilizer and pesticide combinations, and possibly also borrow or rent a fertilizer spreader. They bring their questions and sometimes samples of grass along to have an on-the-spot diagnosis from the lawn and garden expert which many specialty garden centers have working on the floor throughout the year.

Many garden center owners and managers said they held their own, or increased volume a little last year by working harder and longer hours. Although no exact unit data is available, it is believed that the volume retailers continue to gain market share in sales of lawn fertilizers and herbicides because of the increased numbers of chains of retailers which are expanding their offerings of home horticultural merchandise. In short, there are more of the chain stores within easy access to the suburban shoppers who comprise the major market for lawn products.

Market data

According to a study published in 1981 by Frost & Sullivan Inc., a market research firm, only about 40 percent of the nation's 51 million home lawns are regularly fertilized. A summary of this study stated that only about 20 percent of the lawns in the New York-New Jersey area are treated with pesticides, whereas over 60 percent of the home lawns in California and Arizona are treated with pesticides. It attributed this regional data to studies by the EPA. Many of the sun belt states, which are enjoying population growth and economic growth despite stagnation in the rest of the country, are giving

Table 1.
Professional lawn care markets

Product	1979	1982	1985	1988
	(Millions of Constant Dollars)			
Fertilizers	414.34	448.74	486.46	526.87
Micronutrients	381.1*	410.3*	442.8*	477.7*
Fungicides	72.84	79.39	84.28	89.44
Herbicides	20.43	21.68	23.01	24.41
Insecticides	62.98	66.83	70.92	75.27

*-Thousands of Constant Dollars.

Source: Frost & Sullivan, Inc.

Table 2.
Ornamentals and house plant markets

Product	1979	1982	1985	1988
	(Millions of Constant Dollars)			
Fertilizers	47.4	63.0	87.2	111.6
Micronutrients	5.97*	7.95*	10.58*	14.08*
Fungicides	0.99	1.33	1.77	2.52
Insecticides	0.67	0.89	1.19	1.72

*-Thousands of Constant Dollars.

Table 3.
Home garden markets

Product	1979	1982	1985	1988
	(Millions of Constant Dollars)			
Fertilizers	41.0	46.1	51.9	58.3
Micronutrients	56.94*	62.25*	68.00*	74.29*
Fungicides	8.06	8.76	9.52	10.41
Insecticides	6.15	6.67	7.24	7.87

*-Thousands of Constant Dollars

the national marketers of lawn fertilizer and chemicals new hope for maintaining sales volume at a profitable level, although requiring some change in product and marketing strategies.

The current and estimated future markets for fertilizers, micronutrients and pesticides for home and professional lawn care as projected by the Frost & Sullivan study are seen in Table 1.

Changes to manage

The changes in merchandising turf products include stagnation in some areas where high unemployment has impacted local economics. However, there are other areas of solid growth—Texas and other sun belt states, for example.

The influx of customers to the Sun Belt from other regions means good business for the servicing retailers who are prepared to educate the newcomers to local practices for successful lawn care. There also are new seeds being introduced which require special training of retail personnel so they can explain the seeding and fertilizing of the new varieties.

Retailers continue to lose some of their sales of fertilizer, pesticides and application equipment because the demand for these items has been diminished by the professional lawn care services. An estimate given at the Texas Turfgrass Conference in December was that 7.7 million homes in the United States used professional lawn care services in 1980. The servicing dealers have responded to this drain on their business in a number of ways, including offering an application service themselves; or accepting the reduction in fertilizer sales and switching to other lines. There also are reports of successfully switching more customers to using liquid fertilizers which they have seen the contract servicers use so effectively. The latter approach offers some definite savings to customers who are willing to try it.

Selling the problem solvers

Merchandising lawn fertilizers is a pretty cut-and-dried function for both the independents and chain stores. Innovative retailers who want to go beyond the routine-and-obvious find good opportunities in specializing by selling the problem solvers. This includes heavy promotions on the pre-emergent herbicides for dandelions and other broadleaf weeds, for crabgrass and various insecticides. They also can win customers' confidence by showing displays or photos of problem soils in their respective geographic regions, and merchandising peat moss, gypsum or other appropriate soil conditioners to make their customers' lawn-care efforts more successful. ☐

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MARCH, 1982

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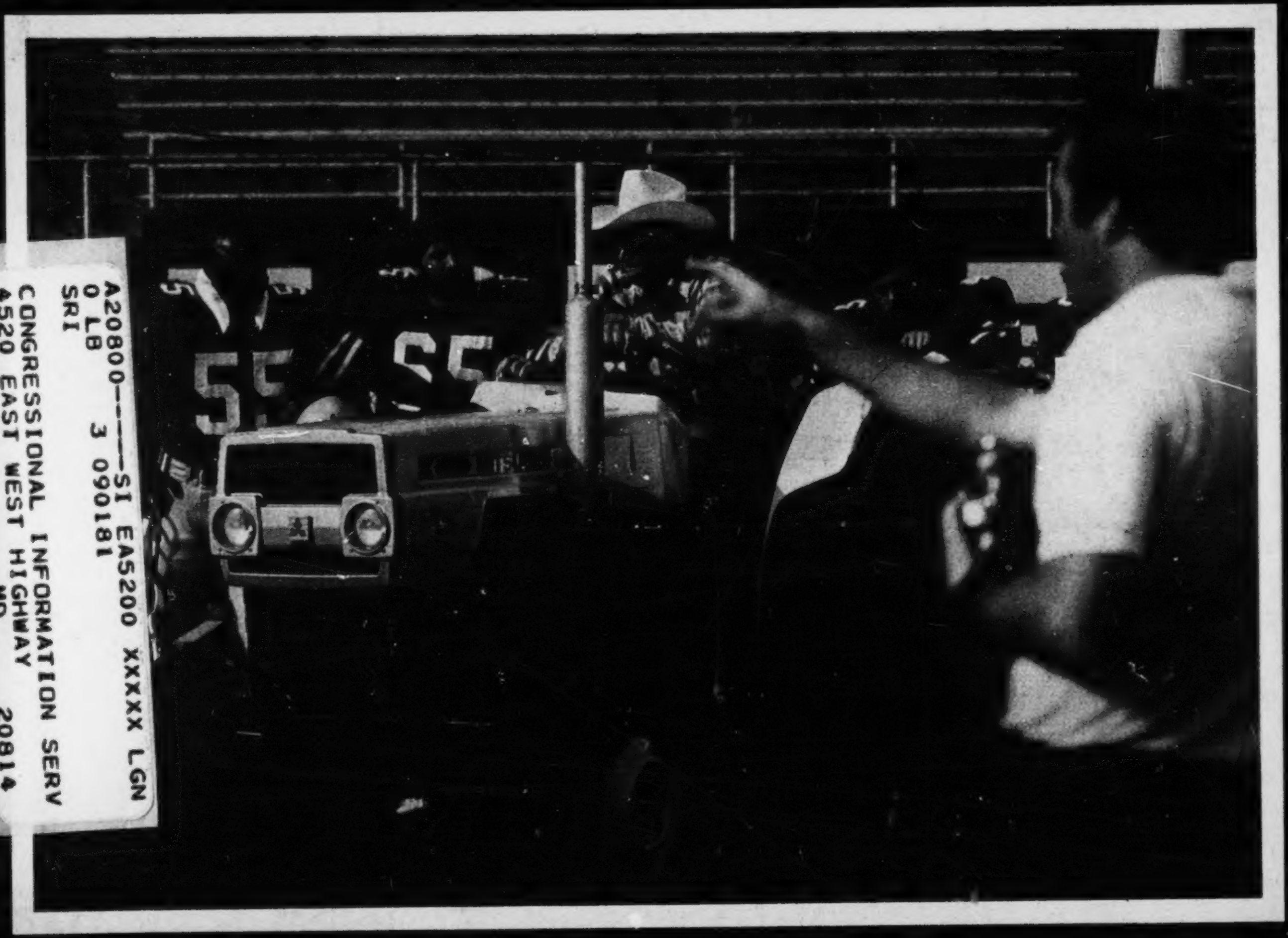

BIG NAMES HELP

getting the ad message across in '82

pages 8 and 18

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The merchandising magazine for lawn, garden and leisure living products.

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4 **The new mowers: 3 ways to safety.** Options are presented for complying with new CPSC standards for gasoline-powered lawn mowers. Electric mowers will be treated in a subsequent article, this series. By Charles Ewing.

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8 **Game plan for power equipment sales.** A Jacksonville, Fla. distributor "coaches" a well-known football personality as well as power equipment dealers to help score more sales in 1982. By Wendall Burns.

18 **Big names, big budgets.** Manufacturers of low-ticket, problem-solving products speak up about spokespersons engaged to give company messages to consumers; and about the cost of advertising. By Marjorie Riggin.

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30 **Mulch, many uses, many faces.** Mulch is not just another pretty face—the many varieties of mulches offer many protective qualities that can be promoted both for sales and consumer satisfaction. By Jerry Johnson.

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Cover photo credit: Stinson & Partners Inc., Jacksonville, Fla.

Coming in the April-May issue: Fall planting—bulbs, seed and equipment for the second season gardeners and owners of fine lawns. Also outdoors: fall clean-up products and snow removal equipment; inside, the indoor green scene flourishes. Winter product sales are reported as disclosed by the **LGM** Product Movement survey.

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Baby boomers may be more impervious than their parents to merchandising blandishments. As teenagers, they were heavily romanced by Madison Ave. for their spendable incomes.

Baby boomers shop DIY stores for lawn and garden items

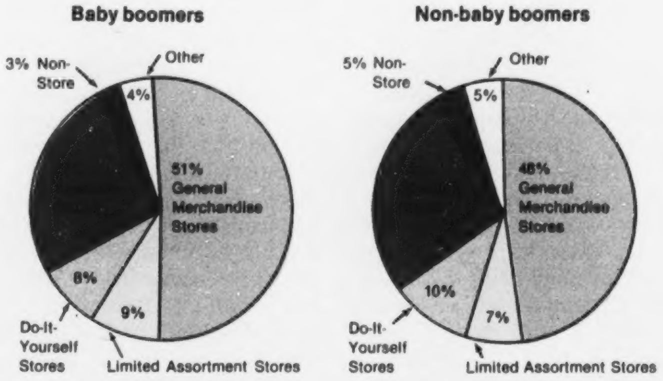
Baby Boomers, the group of young adults born in the post-World War II years between 1947 and 1962, purchase most of their lawn and garden, hardware and automotive merchandise in Do-It-Yourself stores. A recent study entitled *The Baby Boom Generation: Where They Shop* was published by Management Horizons, a marketing research and management consulting firm. The firm's ongoing research program (the Retail Intelligence System) monitors consumers' retail shopping behavior.

Now ranging in age from 27 to 34 (early Baby Boomers) and 19 to 26 (the later crop), these young people have reached head-of-household status. They are a significant shopping force that, according to the study, has established site shopping preferences for many product categories.

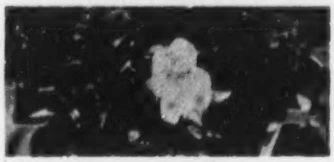
The convenience factor of one-stop shopping and value appeals of price and quality probably inspire them to buy most of their commonly purchased items in general merchandise stores, their preferred store type. The multiplicity of merchandising concepts and locations allows Baby Boomers many options in choosing a store close to home.

As to other specific categories of purchases, Baby Boomers purchase women's apparel and accessories most frequently in apparel specialty stores; men's apparel and accessories are purchased most often in the general merchandise stores. They shop discount department stores for most of their children's apparel.

Store group preferences for total items purchased



Bedding plant sales slowed in '81



Bedding plant sales comparison

Year	Better Sales	Same-or-better	Same Sales	Worse Sales
1970	78%	93%	15%	7%
1971	88	98	10	2
1972	89	97	8	3
1973	86	95	9	5
1974	95	98	3	2
1975	92	98	6	2
1976	88	98	10	2
1977	81	96	14	4
1978	73	90	17	11
1979	86	97	11	3
1980	84	95	11	5
1981	75	92	17	8

At least nine of every ten respondents did record "same or better" sales in each of the last twelve years. Relative to other years, the year 1981 was the second weakest sales year since 1970 and ought to be recognized as such.

An analysis of data from a survey of wholesale growers of bedding plants in 1981 shows softness at wholesale level.

■The 12th annual bedding plant survey conducted among members of Bedding Plants Inc. showed the rate of growth in sales at wholesale as leveling off in 1981.

The analysis of the data was made by Alvi O. Voigt, agricultural economist at the Cooperative Extension Service, USDA, The Pennsylvania State University.

Wholesaling has become more competitive, with more new entrants to the business. Vegetable plant sales don't have the same market expansiveness as flowering bedding. Respondents to the survey cited last year as being the second weakest in sales next to 1978, of the years surveyed beginning with 1969.

Production intentions are for a *bullish* 14 percent net increase for the 1982 market. This increase is the

continued...

1982 Production intentions

(Average percent)

1981 Sales Volume	Increase	Decrease	Same (expressed in numbers of growers)	Net Production Change* (weighted %)
	(Number of growers in parens)			
Less than $10,000	33.9%(15)	100%(1)	5	19.4%(21)
$10,000-$50,000	21.2%(50)	4%(1)	18	15.3%(69)
$50,000-$100,000	25.1%(19)	-	16	13.6%(35)
$100,000-$250,000	13.4%(9)	-	14	5.3%(23)
$250,000-$500,000	24.5%(11)	-	3	23.1%(14)
$500,000-$1,000,000	13.3%(6)	-	3	8.9%(9)
More than $1,000,000	6.6%(5)	-	3	4.1%(8)
TOTALS	**22.7%(115)**	**52.0%(2)**	**62**	**14.0%(179)**

Net production changes for previous years were: 9% for 1973; 10.2% for 1974; 13.4% for 1975; 8.3% for 1976; 11.1% for 1977; 14.7% for 1978; 9.8% for 1979; 12.1% for 1980; 11% for 1981; and for 1982, 14.0%.

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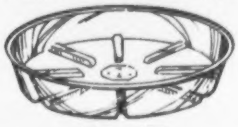

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Bedding plants ...continued

Weighted price increases 1973-81

Year	Per Flat Cents	Per Flat Percent	Per Pack Cents	Per Pack Percent
1973	16	2.8	2.5	2.8
1974	52	11.5	11.5	14.4
1975	46	12.9	9.0	11.5
1976	27	5.2	5.2	5.6
1977	41	6.3	8.5	9.1
1978	29	6.1	6.8	7.3
1979	45	10.8	13.1	8.5
1980	80	10.3	17.9	11.4
1981	68	8.4	28.1	8.7

The weighted absolute price increased 68 cents per flat and 28.1 cents per pack. **Percentage** weighted price increases in 1981 softened somewhat from 1979 and 1980. No attempt was made to distinguish price increases by retail, wholesale-retail, or only wholesale. The absolute value will more heavily represent the survey's retail dominance of bedding plant respondents and the percentage increases would tend to be more reflective of the industry (whether retail or wholesale). [Caution should be used in interpretation of these weighted prices as to their absolute and percentage values. The **relative** value changes are more instructive of market condition.]

second largest on record; 1978 had intentions of 14.7 percent. Furthermore, historical surveys' production intentions have averaged 11.36 percent per year, suggesting a continuation of market growth and strength. Voigt indicates that caution should be exercised in 1982, especially where market weaknesses existed in 1981.

Other results of the survey found that 84 percent of BPIers advanced their prices by 8.5 percent last year, down from the two previous years. Price increases in 1982 will likely be somewhat less because *cost-push* influences of energy and inflation have lessened even though *demand-pull* effects are continuing. A stronger consumer gardening potential is apparent in most market situations. Price increases in 1982 may largely reflect the attention and adjustments made to market competition and customer-consumer needs. An increase ceiling of seven percent is anticipated.

When asked to rate trends of 32 specific bedding plant crops in 1981, such plants as impatiens, tomatoes, marigolds, peppers, cutting geraniums and begonias were rated as excellent. Plants rated as poor sellers included celosia, asters, browallia, phlox, zinnias and dahlias.

One-third of the respondents named timing and scheduling, which are closely followed by maintaining quality, holding and leggy plants, as dominant problems in 1981. A shortage of growing or sales areas and inaccurate market projection also contributed to the downturn. Unpredictable weather predictably was high on the list of contributors to the problem.

The retailers need to head off the internal management problems that occurred in 1981 and predict accurately what the market will demand. The economist noted that the survey of market conditions may not be representative of the bedding plant industry, or of all BPI members.

He commented also that "There's no reason to expect demand to soften; demand should continue strong, actually aided by a sluggish economy as people turn more to gardening for food and fun." ☐

Manufacturers' shipments of equipment 1980 and 1979

(Quantity in units; value in thousands of dollars)

Type of equipment	Number of firms	1980		1979	
		Quantity shipped	Value shipped	Quantity shipped	Value shipped
Consumer nonriding lawn, garden and snow equipment	**73**	**16,076,702**	**1,156,080**	**[r]19,089,597**	**[r]1,325,058**
Lawn mowers:					
Reel, push type, nonpowered	2	[b]54,606	[b]10,135	64,592	10,685
Reel, push type, gas powered	9				
Rotary, push type, gas powered	33	[a]4,046,404	[a]396,396	[r]4,552,953	[r]414,055
Rotary, self-propelled, gas powered	27	[a]1,504,645	[a]222,853	[r]1,621,801	[r]216,377
Electric, all types, including battery powered	6	244,465	24,909	[r]206,773	[r]21,578
Rotary garden, motor tillers	27	[b]609,981	[b]107,637	517,343	92,714
Two-wheel tractors, walking type, except rotary tillers	6	15,063	9,004	[r]17,566	[r]13,330
Snow throwers (snow blower), except attachment type:					
Single stage	14	364,012	[a]91,503	[r]807,931	[r]188,789
Dual stage	11	[a]197,879	71,880	[r]331,905	122,182
Powered lawn edgers/trimmers:					
Fixed blade, gas	10	146,984	16,675	[r]157,749	[r]16,176
Fixed blade, electric	4	648,573	19,606	[r]445,202	[r]12,945
Other than fixed blades	7	6,752,834	121,304	[r]8,461,354	[r]143,689
Shredders and shredder-grinders	6	[b]13,489	[b]3,446	[r]15,621	[r]3,532
Powered hedge trimmers	4	820,107	21,508	771,967	18,711
Yard vacuums and blowers	13	205,817	9,867	[r]396,855	[r]19,778
Lawn sweepers, push type and powered, except attachment type	3	97,615	9,719	110,827	10,252
Other consumer nonriding lawn, garden and snow equipment	11	354,228	19,638	609,158	20,265
Parts and attachments for consumer nonriding lawn, garden and snow equipment	57	(X)	106,619	(X)	[r]119,068
Parts	49	(S)	88,974	(S)	[r]95,361
Attachments	27	(S)	17,645	(S)	[r]23,707
Consumer riding lawn, garden and snow equipment	**28**	**904,664**	**723,781**	**1,006,262**	**789,315**
Lawn tractors and riding mowers, front engine:					
Under 8 hp	4	[c]177,606	[a]82,732	140,918	[r]68,185
8 hp to 9.9 hp	15				
10 hp and over	17	313,680	221,291	361,513	223,917
Lawn tractors and riding mowers, rear engine:					
Under 6 hp	9	[a]43,380	[a]16,879	37,272	[r]12,696
6 hp to 7.9 hp	5	40,579	18,099	[r]48,208	[r]18,972
8 hp to 9.9 hp	14	134,882	82,610	165,665	[r]100,392
10 hp and over	10	42,176	31,608	39,331	26,176
Garden tractors:					
Under 10 hp	4	37,743	54,214	66,004	87,083
10 hp to 13.9 hp	14				
14 hp to 15.9 hp	11	18,713	36,112	35,547	63,973
16 hp to 19.9 hp	18	95,905	180,236	[r]111,804	[r]187,921
20 hp and over	2				
Other consumer riding lawn, garden and snow equipment	2				
Parts and attachments for consumer riding lawn, garden, and snow equipment	51	(X)	215,560	(X)	257,765
Parts	28	(S)	96,369	(S)	108,2[illegible]4
Attachments:					
Rotary, mower decks	20	574,899	59,487	718,865	[r]63,376
Rotary tiller attachments	12	23,147	10,810	25,186	[r]10,412
Blades, dozer	16	[a]24,550	[a]3,280	68,862	[r]8,084
Snow throwers	14	29,813	11,324	[r]61,642	20,738
Carts and wagons	20	15,629	2,312	19,377	2,744
All other attachments	23	(S)	[a]31,978	(S)	44,167

- Represents zero. [r] Revised by 5 percent or more from previously published figures. (S) Does not meet publication standards. (X) Not applicable. [a] 10 to 25 percent of this item is estimated. [b] 25 to 50 percent of this item is estimated. [c] Over 50 percent of this item is estimated.

U.S. reports manufacturers' data on OPE shipments

■ In 1980, manufacturers' shipments of consumer riding and nonriding lawn, garden and snow power equipment decreased 12 percent in value from shipments during the previous, uptrend year: $1.88 billion compared to $2.11 billion, revised shipment value for 1979. Six categories: rotary garden, motor tillers; electric lawn edgers/trimmers; powered hedge trimmers and certain lawn tractors/riding mowers showed substantial increases.

All figures shown have been excerpted from the 1980 Current Industrial Reports, MA-35A (80)-1, compiled annually by the U.S. Department of Commerce, Bureau of the Census.

The increased demand for rotary garden, motor tillers, up 18 percent in units shipped and 16 percent in shipment value, represents inflation's backlash. Thirty-eight million U.S. Americans planted inflation-fighting food gardens in 1980. Correlatively, only rotary-tiller attachments (of all attachments shipped, 1980, for consumer riding lawn, garden and snow equipment) showed an increased shipment-dollar value, although numbers of units shipped were down somewhat.

Among other categories showing an increase in 1980, front-engine lawn tractors and riding mowers of less than eight horsepower were reported as having 26 percent more units shipped with a 21 percent greater dollar value. Rear-engine lawn tractors and riding mowers of less than six horsepower were also in demand: six million more units were shipped (16 percent increase) with a value of $17 million—32 percent higher than in 1979.

A result of mild winters in many parts of the world, 1980 shipments of snow throwers and snow-weather attachments for riding equipment practically reversed 1978 and 1979 trends. Blades, dozer: down 180 percent. Snow throwers, single stage, non-attachment, down 122 percent; and dual stage, down 67 percent.

Reflecting higher prices, rotary lawn mowers, self-propelled and gas-powered, garnered $6.5 million more in shipment value, although shipments were down by seven percent. Rotary mower deck attachments dropped 25 percent in units shipped. ☐

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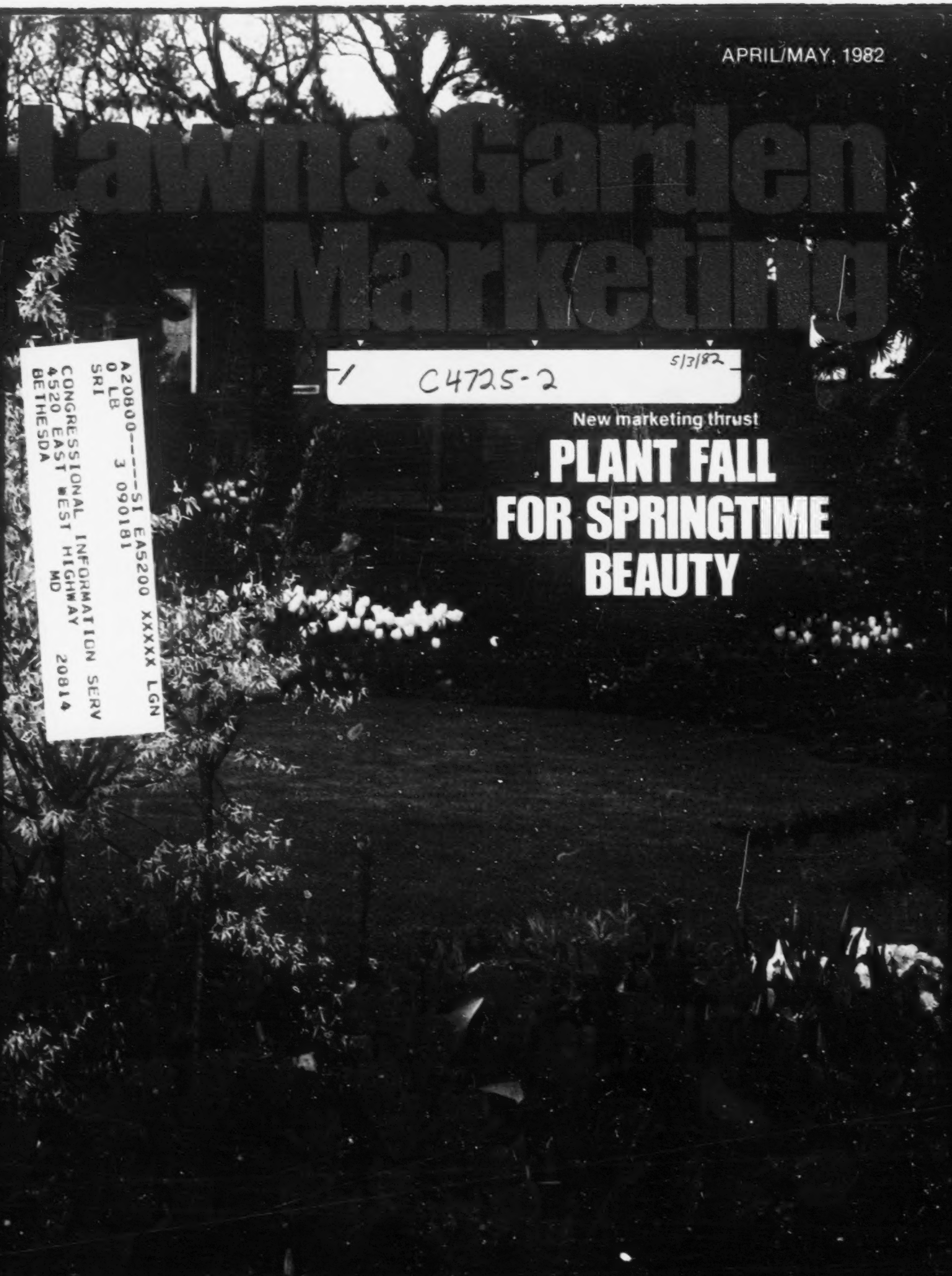

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Fall is for planting
TREES · SHRUBS
LAWNS · BULBS

16 'Plant Fall' for springtime beauty. Pennsylvania garden centers found that a statewide program increased fall sales. One firm, Snipes Farm and Nursery, used the state promo, an ad agency and lots of colorful displays to build traffic and sales.

16 FIFP program offered retailers in 25 states. 'Fall is for Planting,' and there is a coordinated, aggressive marketing plan developed by the Fall Planting Council to generate second-season sales.

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56 Product movement report: winter. Immediate need, rather than long-term savings or other factors, was the main determinant governing sales volume of selected product lines—according to retailers responding to the latest **LGM** survey.

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Cover photo: Courtesy of Malak Photographs Ltd.

Coming in the June/July issue: Why kerosene heaters are setting the pace. Update on the wood-heating market: stoves, fireplace inserts and accessories; sales, shipment and costs data. Analysis of sales trends in chain saws and log splitters. Report on prices, materials, sources for the quality Trim-a-Tree market. Part 2 of the New Mowers series will be a report on which of three ways manufacturers have chosen to respond to an impending mandate to produce (after June 30) only mowers whose blades can be stopped within three seconds.

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BULBS
brighten autumn sales picture

Market trends and merchandising methods for retailers of flowering bulbs are described in this report.

By I. Jerrold Johnson.

■ One of the more traditional segments of any "Plant Fall" program would have to be spring-flowering bulbs. But traditional, at least in this case, does not mean static. Far from it. There is a ripple of excitement that permeates the bulb industry. A recent survey of retailers showed that bulbs were one of the few lawn and garden products lines to show an increase in sales in the fall of 1981.

One major wholesaler said his company's sales had shown an approximate 20 percent increase and the Netherlands Flower-bulb Institute stated that there had been "a significant increase."

Why this upsurge? The reasons are not clear-cut, but a combination of factors. Philip Van Zanten, bulb department manager of Vaughan's Seed Co., said that the spurt in sales came as somewhat of a surprise to his company. In retrospect, he feels at least part of the increase related to a strengthened dollar. The majority of fall bulbs are of Dutch origin. With the stronger U.S. dollar, Van Zanten noted that fall bulbs could be purchased at a better price. The lower price could be passed down the line to retail sales. Looking ahead to the upcoming second season, Van Zanten is very optimistic that the upward trend will continue. He notes, however, that weather remains a major determining factor. He feels that when spring bloom is poor, interest tends to wane for the following fall planting season.

Better-informed customers

Another determinant in the fall bulb boom relates to better growing techniques and more knowledgeable consumers. Efforts are under way to increase product knowledge and improve growing techniques—all bright signs for better bulb sales in the years to come.

Dr. August De Hertogh heads the horticulture department at North Carolina State University at Raleigh. He also serves as an advisor to the Netherlands Flower-bulb Institute. Dr. De Hertogh advocates several cultural practices to make bulbs a more valued and easier-maintained part of the home landscape scene. One of his key points is the perennialization of bulbs—developing techniques that allow bulbs to become a permanent part of the landscape without the need for lifting and dividing them.

Bulb fertilization

Dr. De Hertogh's theory, in part, is that bulbs do not become overcrowded, but generally deplete the soil nutrients within their growing area. He stresses a program of fertilization with the correct formulations to maintain healthy bulb growth as a substitute for lifting and separating—certainly a practice that should appeal to most home owners. Another part of the theory is to let the top growth die back totally before removing it, so the tops can provide more complete nourishment to the underlying bulb.

Bulbs in landscape

Some home owners are not happy with unattractive top growth following bloom and they frequently cut off this growth too soon. This is because, in the past, bulbs commonly were planted in groups, by themselves, for maximum splashes of spring color. Dr. De Hertogh believes that home gardeners should intermix bulbs with other perennials. The old top growth would be masked until it finally died back, with full benefit to the bulbs. Bulbs also should be planted deeper into the ground to allow overplanting of other ornamentals and later-blooming plants.

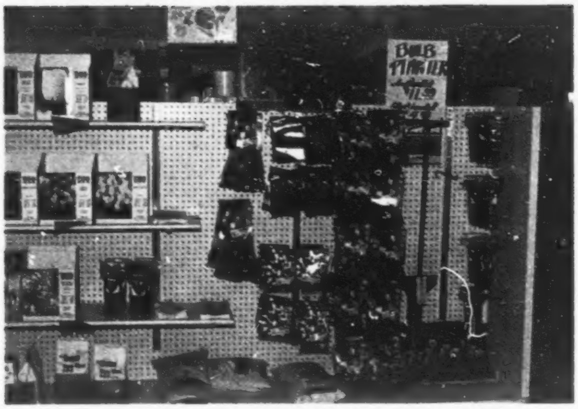
Sequential blooming

Another practice widely advocated and merchandised throughout the fall bulb industry is *sequential blooming*. Dr. De Hertogh notes that, with proper selection of bulb types and by choosing a range of maturities within particular types (especially tulips), fall-planted bulbs can provide almost continuous bloom in most parts of the country for a period of 3½ to 4 months.

Sequential blooming has caught on with the merchandisers, too. Assortments are being offered that include the earliest bloomers, such as crocus, through hyacinths, daffodils and tulips. There are other bulb species that can carry bloom on beyond tulips. Vaughan's offers a gift pack assortment of 50 bulbs that retails for $7.49. Others, of varying quantities and selection, are becoming more common in today's market.

Merchandising suggestions

Not only is the consumer being offered improved growing methods to produce better results with fall bulbs, but the retailer is being pro-



Books, bulb food, bone meal, peat moss, planters, and gloves are allied products that go along with merchandising bulbs.

The practice of forcing bulbs for indoor display has gained in popularity, opening up new markets for bulbs, as well as for pots and other accessories.

vided with more effective merchandising tools and suggestions. Most suppliers offer eye-grabbing full-color illustrations of their products in full bloom and growing tips for the customer, either on-package or as handouts with the bulked bulbs.

The Netherlands Flower-bulb Institute, representing approximately 75 marketers dealing with all types of outlets, is in the process of developing a merchandising guide for fall bulbs. Included in this guide are the following 12 tips *To Make Your Bulb Profits Grow,* developed by Robert LaRue, interim manager of the bulb institute:

- Put bulbs out front where they will encourage impulse sales
- Use hard-working, colorful p-o-p.
- Advertise bulbs: early, during the season and late
- Sell by blooming sequence: early, mid-season, late
- Build a simple bulb information center, with literature and books
- Sell multiples of 10 or more
- Use tie-in items outside your store to get customers in
- Use tie-ins in-store to get bulbs and other goods sold
- Plant your own garden outside to encourage preseason orders
- Force bulbs to turn customers on, in-store, next spring
- Keep your displays stocked and neat during the season
- Consolidate your display and move it out front, perhaps to checkout, to assure a full sell-through.

Some of the other merchandising tips suggested include a large flower pot filled with sand, with artificial tulips or other fall bulbs placed in it, and a handmade sign encouraging customers to "Plant Now for Spring."

LaRue stresses unit sales and unit pricing, with the suggestion of 10 or more bulbs, in bags, in with the bulk goods. The packages can be made up of selections based on blooming time, type, color, etc., and packages can be priced in "two-for," "three-for" or other multiples. Tie-in products also can be offered at discounts with the purchase of a specified number or dollar amount of bulbs.

An importer's view

Another view of the fall bulb picture comes from Rudy Bonkenburg, president of the J. Bonkenburg Co., an importer who sells to jobbers and wholesalers. Bonkenburg feels that the consumer emphasis is away from price and toward quality and a demand for a wider selection of types and varieties.

His company is following this trend by including more diverse types and varieties in its assortments and by paying more attention to the information included on its point-of-purchase materials and packages.

Bonkenburg sees the bulb business moving from the supermarkets and variety store chains and toward the garden centers, both chain and specialty stores. He said more loose bulbs are being sold in stores that can provide cultural information to consumers. He sees packaged bulb sales declining, except for special promotions and for sales by outlets that cannot provide growing information to customers.

Bonkenburg noted that fall, 1981 had been a banner season for bulb sales, part of which he attributed to better-than-average weekend weather through most of the country. He is looking for another good fall season, with somewhat lower bulb prices due to a temporary condition that involves larger Dutch production and a lower European demand. □

Bulb exports from Holland to U.S.

(Million bulbs)

	1979	1980	1981 (through Aug.)
Tulips	142	155	168
Daffodils	26	30	35
Hyacinths	23	25	24*
Crocus	68	71	50*
Muscari	18	25	14*
Iris	36.5	62	65

*Crop Shortage

Source: Netherlands Flower-bulb Institute/Netherlands Board of Ornamental Horticulture

Indoor foliage lives!

More people today buy plants for their decorative appeal.

By Marjorie Riggin.

■The indoor foliage market is alive and well with 58.8 million U.S households (76.4 percent) keeping plants, according to a September, 1981 consumer survey authorized by the Phillips Products Co. Also according to this survey, 55.6 percent (32.6 million) of these households keep plants because of their decorative qualities and 44 percent (25.9 million) indicate that they are going to keep *more* plants in the future. Figures from the U.S. Department of Agriculture Crop Reporting Board show that foliage plants for indoor or patio use netted producers from 16 reporting states $329 million-plus in 1981, a five percent increase over the previous year. This same report indicates production area intended for green foliage plants in 1982 as 104 percent over last year's; more than five million square feet to be added.

In 1979, the percent of households keeping plants was 80.2. So the market is down 3.8 percent! In terms of millions of households, the indoor plant scene is still a good market—a fact informally corroborated by wholesaler-shippers selected at random for interviews with **LGM.** Veterans in the business advise that eulogies be reserved for the fast-buck entrepreneurs who have faded from the field they overcrowded during boom years. Oldtimers are hanging in.

% Households Keeping Plants

1975	1976	1978	1979	*1981
74.3%	75.9%	81.9%	80.2%	76.4%

% Households Not Keeping Plants

1975	1976	1978	1979	*1981
25.7%	24.1%	18.1%	19.8%	23.6%

*It is estimated that there are 77.4 million households currently in the U.S.
Source: The Phillips Products Co.

Anthony (Tony) Zanetta, supply manager for Chase Gardens Wholesale Florist, Portland, Ore., says that during the peak years "more growers and more and more green shops were springing up; even the ladies' boutiques sold plants. Now, the better ones (wholesalers as well as retailers) have stayed."

Believes market has stabilized

He believes that green plants have been trending down for the last eight years but that the drop has leveled off. "The level is considerably above the old beginning (pre-boom) level, however." Zanetta also feels that it is a lack of spendable income, rather than a severely diminished demand for indoor foliage plants, that is the key factor in today's market.

Chase Gardens has 22 acres under glass, and ships green plants throughout the Northwest.

In Michigan, Nick Slagter, vice president of United Bulb Co., said substantially the same thing. "*Every*one was growing, and during the boom, everyone did quite well. Then, as the heat came off, more and more of the smaller units quit. Those who specialized stayed in."

United Bulb Co. are jobbers, shipping "all over the country." Slagter believes, however, that more retailers are going directly to the wholesalers these days but that there's still enough (business) to go around. "Ten-inch and three-inch, varied, material is the most popular," according to Slagter. "Ferns are spotty...they're good at a certain time of the year. Hanging plants are still good..."

Upbeat in Southeast

Dixie Green Inc., one of the largest producers, shippers & wholesalers of nursery goods in the Southeast, had a good year in 1981 and, so far this year, business is still upbeat. "We had about a 20 percent increase last year. During January and February, 1982 we showed another 20 percent. We buy a lot and re-wholesale—two trailer loads from Florida last week, for example—plus we have about 250,000 square feet in production." So says Don Tucker, Dixie Green's sales manager.

Best seller in the indoor green foliage lines? "Ferns...this is a spring item, but the demand stayed up through most of '81. Ferns already are big this year."

During 1981 business was good but the increase wasn't there, according to an anonymous spokesman for a grower-shipper in a midsouth state. His nursery fills foliage plant orders from St. Louis and as far east as Pittsburgh; from Chicago, south to Memphis, Tenn. "There's still a strong market for foliage but it's leveled off. The market will continue to grow but at a lower rate of increase."

'Flowering' a trend?

Biggest demand? "Sometimes I think the answers to this may depend on what growers are trying to push. Personally, I believe the trend is toward flowering potted plants. In foliage, *Philo pothos* is a big item every year but there always is interest in new plants, too. Also, there always is a demand for plants that grow well in low light..."

Speaking for Gatti Nursery Inc. in San Francisco, Staci Silva, marketing manager, believes that growers and retailers must work together to merchandise nursery products. "A lot of nurseries combine orders so that freight bills are lower," Miss Silva said. Freight costs have directly inflated the prices of green foliage plants.

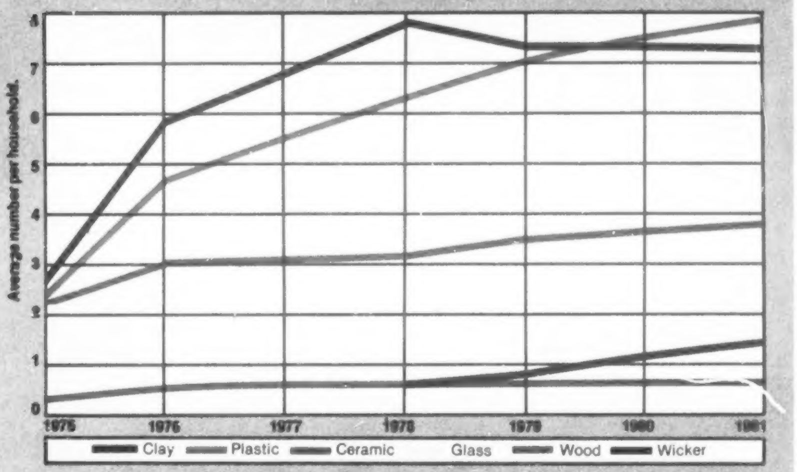
Miss Silva pointed out that outrageous prices ("People don't have that kind of money!") are sending retail buyers to the chains. "The chain people are getting better quality than before in order to get people in...and it's working. The grocers, for instance, also are finding competent help to take care of their plant selections. The displays are looking good and people are buying."

Larger uprights selling

For the most part, Gatti's outlets throughout the U.S. and Canada

continued...

Survey question:
"How many planters of the following materials do you have?"



Results of the 1981 study indicate that the average number of plant containers in those homes keeping plants continues to grow. In 1975, the average household had 10.0 plant containers. By 1981 this number had more than doubled; the average home keeping plants had 21.9 plant containers.

Source: The Phillips Products Co.

Indoor foliage ...continued

are ordering non-specific assortments of foliage plants. "One exception," she says, "people are buying more of the larger uprights rather than the hanging plants. For us, hanging plants are down."

Business is down, generally, in the San Francisco area.

"The economy is still pretty positive in San Antonio," says Richard Hassman, sales manager for Dietert Greenhouses, grower-shippers in that Texas city. "The people I've talked to feel pretty good about it."

Foliage for decor

For Dietert's, the 1981 green foliage plant sales curve is "up some – more because of greater emphasis on the place of foliage plants in interior decoration than any effort we have made. Actually, we're shipping more blooming plants than foliage." There still is some demand for the larger tropical plants, such as 'Emerald,' but, as in San Francisco, larger hanging baskets are down, according to Hassman.

"We do have one concern right now: the upper end of the price scale (on a retail basis); there is not quite as much demand for the big, expensive plants. We're affected by some of the same factors they're faced with in the East. Since we only ship throughout Texas – all of Texas – we're not really hurt."

Jack Pearce, sales manager of Wincopia Farms Inc., Laurel, Md., is "just hoping that it keeps rolling!" For Wincopia Farms, business in 1981 was much better than 1980 and they "still are maintaining good shipments."

These shipments travel mainly by company trucks to Baltimore, Washington, Philadelphia, Richmond and Norfolk, Va. The demand varies more by chains than by area, according to Pearce. "Some chains give it (plant section) to the produce manager; that's the last thing he wants. Some, to an actual plant person...you can walk into a store and tell who's in charge of the plant department."

Hanging baskets UP in East

"What's in demand? Hanging baskets have taken off! It's the smaller ones that we can't keep enough of...the more expensive ones are dropping off. I'm not sure if it's the economy; it might be a trend. I wonder if a lot of people have decided they can buy the little one, grow it and get the pleasure of watching it grow. In a couple of months it's as good as the big, expensive one and they've had more enjoyment. Don't misunderstand, we're still shipping quite a few of the big ones, too."

In Missouri, there's a 22-year plants-industry veteran who echoes sentiments about the "fly-by-nights," about people in buying control who buy too conservatively; and who also voices opinions about plant departments that fail because of poor servicing.

"In a general merchandise store, the plant counter can gross the same as hardware or any other big department unless the plants are serviced by (a non-plant person). The plant department goes (out) because the plants look so bad no one buys; it takes five years to get a department back in the store."

This from Len Eason, sales manager for A.D. Mohr Greenhouses Inc., Pleasant Hill, Mo. Until now A. D. Mohr has not been a quantity distributor of green foliage plants. Quality Plants, plant wholesaler with whom Eason also is associated, is moving from Eldorado Springs, Mo., to Pleasant Hill. Foliage plant orders from ten states are shipped through Quality Products.

"We cover enough area in our merchandise to be ahead in sales. We ship to Iowa, Nebraska, Kansas, Missouri, Illinois, Texas, Oklahoma, Denver and Florida.

The high cost of 'cheap'

"We've started a major basket business here – it's eight times better than the year before. In this and in all our plants we sell quality. Buy price and get junk! 'Cheaper' is a bad deal for everybody; people become unhappy. Buying by price usually results from somebody sitting behind a desk who knows nothing about plants.

"Another thing: promos are off. Before the economy crunch, promoters would plan and order three at once. Now, they work one, then wait, then order another. Then, they can't service the demand because they don't have what they need when they need it.

"Green foliage was on the uprise for seven, eight years; it leveled off the last two but the dollar volume is about the same. If it goes down it's because buyers haven't enough guts to commit the dollar bills. The plant business is there if you hustle!" ☐

See page 56 for results of **LGM** *survey of related product lines.*

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DEEP SNOWS force equipment sales up

Dealers in regions hit by heavy snowfall reduce snow thrower inventory. They're reevaluating consumer preferences in equipment size. By Marjorie Riggin.

■In the 1981-82 snow thrower selling season, the storms came late almost all across the country but they finally came. "Digging out" no less furiously than the consumers were the dealers. Fifty percent of the retailers handling snow throwers reported in an **LGM** survey that sales volume was higher in the winter just completed than one year ago for this product line. And stocks were down.

As was anticipated, the survey showed a sharp reduction in holdover inventories at the end of the snow thrower selling season due to the fact that retailers were extremely conservative in ordering new stock last year, then were favored with the snows that decimated backlogs in some snow belt markets. Indications are that holdover inventory decreased more than 70 percent as snow thrower sales at retail level rose more than 100 percent compared to 1980-81.

Narrower, more powerful

Speaking for Kemman Distributing Inc., Don Holt, controller, exulted in an excellent snow season, excellent sales and consequently reduced inventories. Kemman distributes Ariens snow throwers throughout Alaska, Idaho, Oregon and Washington.

"We've had an excellent snow season although it was about a month late. After two abnormal winters, we're up and rolling." Asked about perceptible trends, Holt said that Kemman "formerly sold more of the smaller machines; now the demand is for narrower, more powerful devices."

A nation's width away, smaller units were in demand at Eaton Equipment Co., Hamburg, N.Y. Wyn Eaton concedes that 1981 was a better year and that his company cleaned out a lot of dealer inventory but "still has a carryover." Snow fall in his area reached the 40-year average of about 90 inches but there only was one good blizzard—the rest fell "two inches here and there."

Mix has changed

Eaton also feels that the mix has changed: it's the smaller, lower-price, single-stage snow thrower that's most in demand from his (Toro) dealers whereas, "backtracking to the famous blizzard of '77, everyone shifted to two-stage snow blowers. Out in Milwaukee, though, they're going for two-stage; and a distributor I talked to says they're still sitting on the smaller, single units...so it's a gamble as to total numbers **and** as to mix."

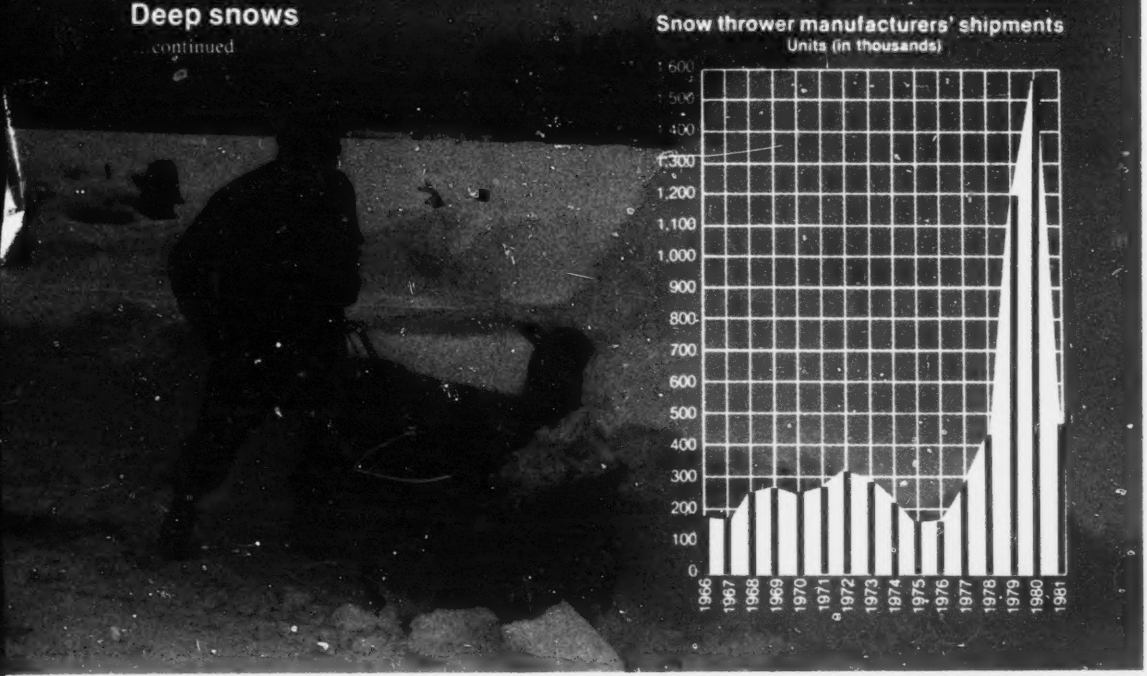
Further comments? "SEND SNOW!"

Upstate, Horst Pogge, president of Grassland Equipment and Irrigation Corp., Toro Distributors, Latham, N.Y., blames late snow and sticker-shock for market trends in snow throwers. "The cost has determined what people are buying. They're not buying what they need but what they can afford. If they haven't bought this kind of equipment for six or seven years, they find the price has more than doubled so they go to the smallest possible unit.

"We had a fairly good snow winter but only two good falls with accumulations of three or more inches...if snows come after January, people are not in a spending mood...you have to get the sales before Christmas.

"And our dealers can't afford to carry a large stock. At 17, 18, 20 percent, there's no money in it. We hope the interest rates will go down. Here's another thing (involving interest rates): they're building about a million less homes per year now; that's a million homes that don't need snow throwers or any other power equipment. The interest rates are hurting everybody."

continued...



Statistical data source: OPEI

The industry is awaiting reports on shipment data for the 1982 model year, which concluded Feb. 28. Some manufacturers said that despite heavy mid-winter snows and improved retail sales, dealers did not reorder stock. Manufacturer shipments in the 1981 model year dipped to 344,700 units after a peak of over 1.5 million in 1980.

Photo credit: Tecumseh Products Co.

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Grassland's commercial business has been good; there's no backlog of heavier snow equipment. "We give good service and have a good parts supply...we're making a special effort to have a good department because this is where our future is. Good service!"

"Where do we stand with our (Ariens) snow throwers? We're 50 percent behind in sales to our dealers and we stand 50 percent over in retail sales. Our retailers haven't

continued...

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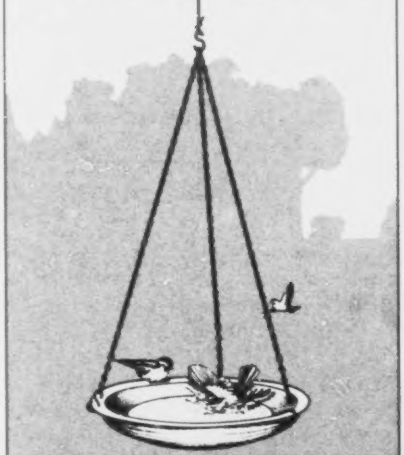

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Deep snows

...continued

sold out (their backlog) but they've sold down," said Scott Smith, president, Stull Enterprises, Chester, Pa.

Smith considers snow throwers as a product line that really has been in recession but that will be coming back. Somewhat cautiously, however, he conceded that "we don't expect a good year, but we probably will sell out our inventory." No complaints, really—the snows came later but they were fine...for snowmobiles.

From the retailer's point-of-view: the St. Louis area won't soon forget the winter snows of 1981-82 but "we needed a heavy snow **early** in the year," said Mrs. Elmer Wolfe whose husband is president of El-Mel Feed and Supply Inc., Yard-Man dealer, Florissant, Mo.

"The large throwers moved best when the big snow came because they were needed for commercial use. We really moved the three and one-half, five, eight and eleven horsepower, two-stage snow throwers but the small ones didn't move too well. You had to knock down the snow a little bit, it was too deep for the small units unless you did. Altogether, we sold more than we would normally sell...before 1977-78, we would have snow throwers for three, four years. We have 30 on hand now...we only bought one **this** year."

Strictly weather effect

James (Jim) Robinson, general manager, Midwest Toro, Omaha, Neb., repeats the litany that all the snow thrower problems stem "strictly from a weather effect. If the product had moved, interest (rates) would have been no problem."

Perhaps only in volume has Toro's plight been different from others across the country. Anticipating normal snow, Toro started building one million snow throwers about three years ago—dealers built up heavy inventories. In Midwest's three-state area, near-snowless for those years, "the pipeline became jammed with snow removal equipment. Everyone needed to get out from under. This cost some small dealers their business because they couldn't compete with those who were selling throwers below cost. Now, after this year's late snows, dealers' inventories are depleted 70-80 percent but they are exercising an extreme reluctance to reorder."

Toro also has a carryover at the factory. The units really should be up-priced to cover accumulated interest, according to Robinson. The manufacturer won't do this; instead, Toro will extend themselves to help their dealers out of this temporary crunch. Robinson indicated that they might have to go dealer-direct to offset costs.

"What we have is what I call our 'inch worm economy.' The dealer isn't buying until he sees snow. The distributor, then, won't buy even for his early-order bonus. Without orders, manufacturing stops. Everyone sits there on the hump waiting for the back end of the worm to catch up with the front end so we can start inching ahead again. Inevitably, the manufacturers AND the people will be faced with having no snow blowers." ☐

Wonderlawn sweepstakes winners

Garfield Williamson Inc., distributors of Wonderlawn seed and fertilizer products, recently announced the winners of their Beautiful Lawn Sweepstakes.

The $500 first prize went to Cynthia M. Conway of Cherry Hill, N.J. Steve Federicio of Brightwaters, N.Y., was awarded the second-place prize—a Toro power lawnmower.

The sweepstakes is an annual event in the tri-state area. A total of 15 prizes were awarded this year, including another Toro power mower and Toro trimmer-weeders.

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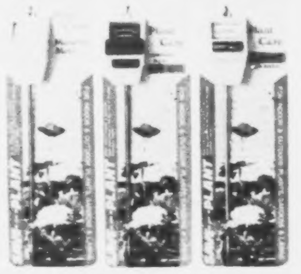

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SALES CLOUT FROM KEROSENE

The new mowers page 4

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18 **Good news for some.** Sales of chain saws and log splitters are spotty. The need for cordwood continues to produce wood harvesting income in some areas.

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22 **Wood heating and the garden connection.** Gardens for All/Gallup survey figures show the correlation between the two markets.

27 **Price plus portability = sales clout for kerosene.** Kerosene heaters provide affordable zone-heating capabilities—making them a "hot item" with presently unlimited sales potential.

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38 **Floor-planning: a greater role for the distributor.** In Executive Forum, Joseph H. McConnell, American Acceptance Corp., points out how distributors can help dealers resolve financing dilemmas.

56 **'Twas a year before Christmas.** And on-their-toes Trim-A-Tree retailers already were gearing up for those holidays 12 months ahead.

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Coming in the August issue: A "Who's Who" of exhibitors at the National Hardware Show, as well as seven other major shows. NEW PRODUCTS SHOWCASE of products to be exhibited at the NHS New Products Exposition. Power equipment update, trends and data. The ABCs of 2-cycle engines—first of a series of graphic illustrations and explanations for use by retail personnel. The latest **LGM** Product Movement Report presenting sales data on lawn fertilizer and walk-behind mowers.

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Barbecue industry measures market expansion efforts

■The shipment and sales data for barbecue grills—charcoal, gas and electric—show that another record was reached by the industry in 1981. The data, released in mid-April by the Barbecue Industry Assn., showed a two percent increase in unit sales; thereby reaching an all-time record of 12,075,616 units. This compares with sales of 11,844,914 in 1980, an increase of 230,702 grills.

Estimated charcoal grill sales, including imported hibachis and all domestic output, rose to a new record of 10,229,045.

Estimated gas grill sales, including table and stand-up models, reached 1,737,351—up 149,931 from the 1980 record of 1,587,420.

continued...

Table 1 UNIT SHIPMENTS AND DOLLAR VALUE, 1980 and 1981

	1980		1981	
	Units	Dollars	Units	Dollars
Gas	1,587,420	162,435,925	1,737,351	183,476,221
TOTAL	[illegible]	[illegible]	[illegible]	[illegible]

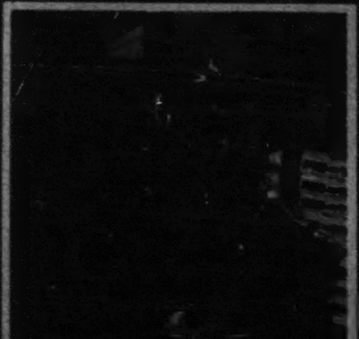

Table 2 TOTAL ESTIMATED DOLLARS SPENT IN BARBECUES—1981

Charcoal briquets	279 million
Tools & Equipment	23 million

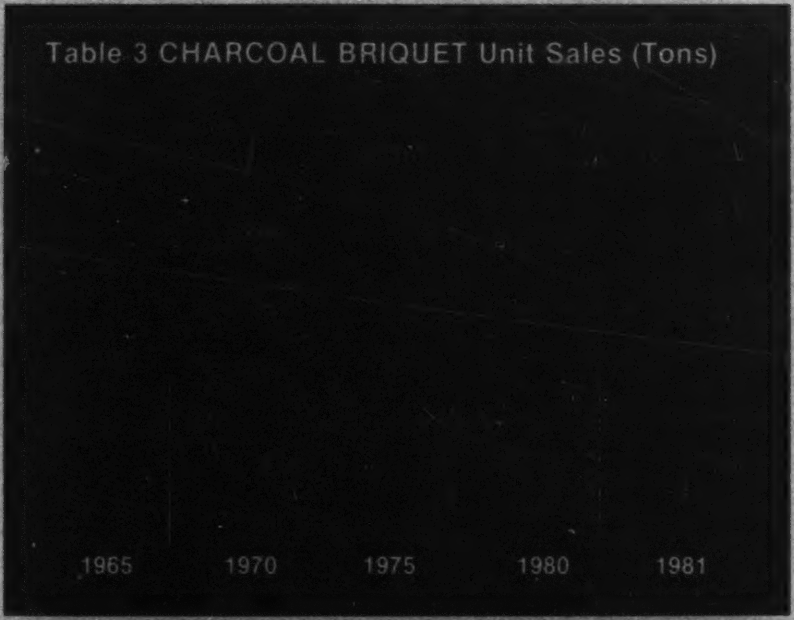

Table 3 CHARCOAL BRIQUET Unit Sales (Tons)

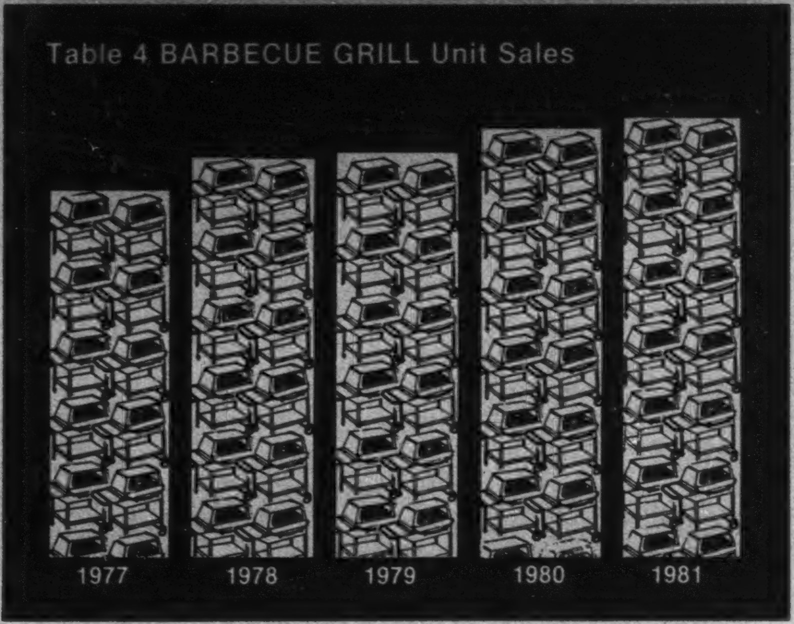

Table 4 BARBECUE GRILL Unit Sales

Barbecue

...continued

In the electric grill category, movement also was reported up with sales of 109,220 compared to 99,190 the prior year.

The board of directors of the Barbecue Industry Assn., at its 1982 annual convention, acted to expand its membership to include many related industries; and to combine their efforts toward one goal: more consumer use of outdoor cooking equipment and supplies. Initially formed to represent the manufacturers of charcoal briquets, the association later added charcoal grill manufacturers to its membership roster.

The BIA next added manufacturers of gas and electric grills, followed by the manufacturers of grill lighters and accessories. The board now has moved to unite the joint efforts of these hardlines manufacturers with the outdoor-cooking marketing initiatives of food and grocery product companies in order to expand the market.

The link to lawn and garden

The relationship of consumer expenditures for barbecue grills and other patio-living products to expenditures for lawn and garden products and activities was outlined in a report by **Lawn & Garden Marketing.** Speaking for this publication was I. Jerrold Johnson, who reported on trends of population growth in the Sun Belt; and in suburban and small towns near large cities. Wally Simmons, speaking for *Sunset* magazine, said there is a rolling wave of population coming into the prime of life (20-49 age group) in the 1980s and that this surge in adult population will provide marketers with the greatest challenge ever. He described container gardening and lot-line living as concepts pioneered in the West and passed along to the rest of the country. These concepts include designing and furnishing the garden as an outdoor room.

Consumer media programs

It was reported to the manufacturers that total impressions for the 1981 market promotion campaign represented better than 20 percent growth over 1980. Since 1981 had been positioned as a "maintenance year" rather than a growth year, the achievement of 612 million impressions (compared to 505 million in 1980) showed exceptional support and belief in the barbecuing lifestyle by the consumer media.

The association's efforts succeeded in getting 11 states to declare May as National Barbecue Month.

The BIA estimates that total annual consumer dollars spent on barbecuing add up to $4.34 billion with $3.6 billion being for food and grocery items and the balance for equipment and accessories. (See Table 2.)

The estimate is that over 105 million grills are owned by the country's 73 million barbecuing households.

The Barbecue Industry Assn., Naperville, Ill., is managed by Arthur W. Seeds, president. ☐

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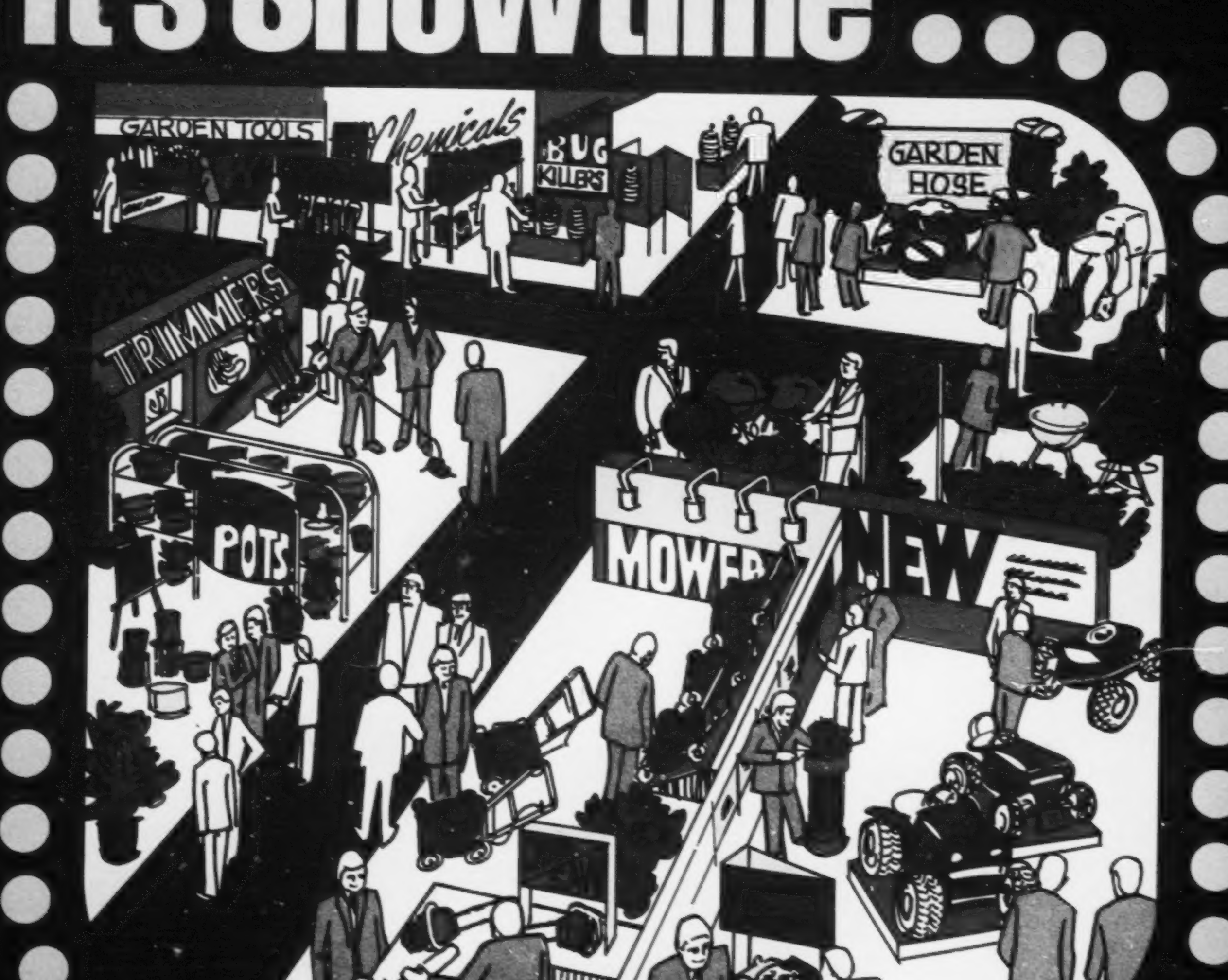
AUGUST, 1982

It's Showtime . . .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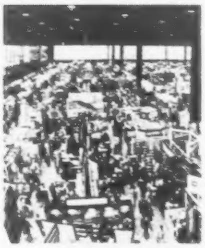
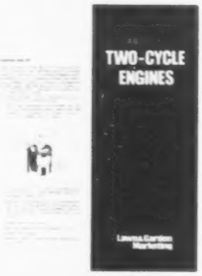


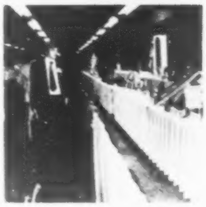
4 **Small gains for 1982, 1983.** From the OPEI annual meeting, a long hard look at what's ahead for the power equipment industry.

15 **The 8 big cities.** Hosting the eight big shows are cities noted for diverse attractions and cordial hospitality.



30 **The 8 big shows.** Lists of major exhibitors indicate at which national and regional shows their wares will be displayed "ready for business."

60 **Product Movement Report.** Retailers give data on eight product categories.



70A **ABC's of the two-cycle engine.** Graphically illustrated insert, first of a series, designed to pull out and use for ready reference.

88 **New products expo.** An array of products to be presented to the industry at the National Hardware Show New Products Exposition.

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Coming in September: The New Mowers, part 3, describes distributor, dealer and consumer reaction to the CPSC-mandated "compliance mowers." Selling the Sun Belt: The Capel Klang Story. In multi-parts, the many facets of a lawn and garden distributor giant. ABC's of Insecticides: the second in LGM's product knowledge series.

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OPE outlook

First, a decline; then a powerful tide

Declining sales, liability claims and imports are "now" concerns of OPEI members; but at their annual meeting they also had a tantalizing glimpse of "a powerful tide" of suburban markets in the 1980's.

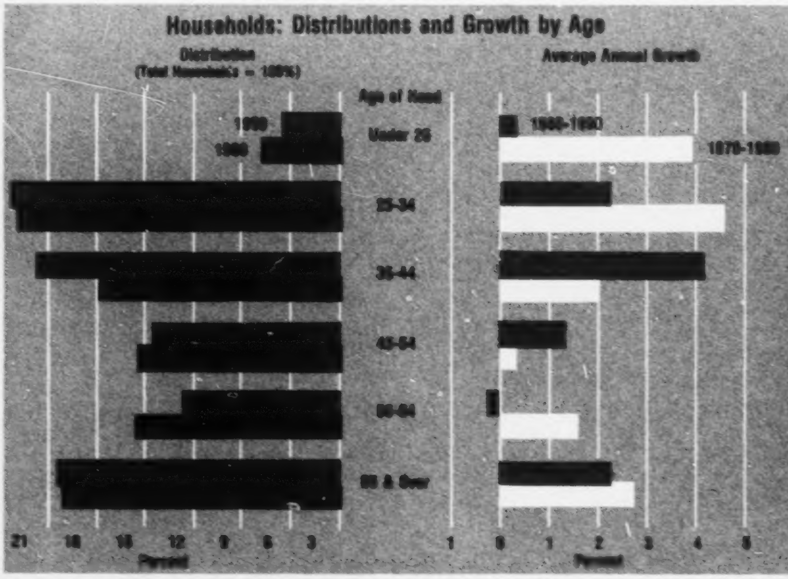
Mark C. Rostvold, director, consumer products marketing, Deere and Company, presented the 1983 industry outlook during the annual meeting of the OPEI.

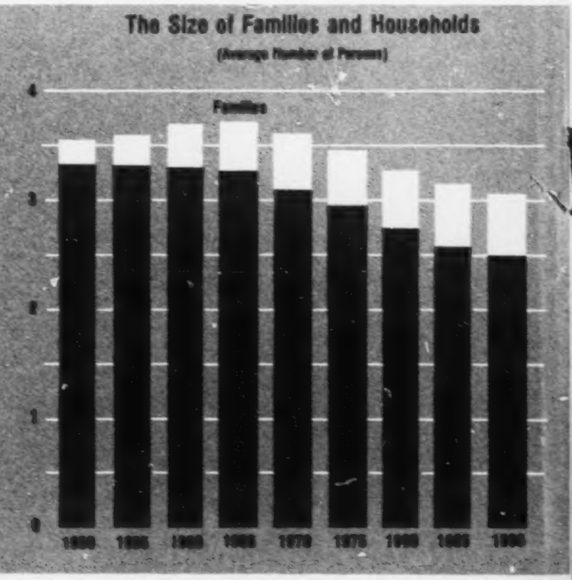
Industry shipments – five model years

	Actual 1979 (000 units)	Actual 1980 (000 units)	Actual 1981 (000 units)	Projected 1982 (000 units)	Forecast 1983 (000 units)
Riding Garden Tractors	254	220	151	152	156
(% change)	+3	−13	−31	+.7	+3
Lawn Tractors/Riding Mowers	858	808	620	628	648
(% change)	+14	−6	−23	+1	+3
Walk-Behind Power Mowers	5,900	5,700	4,600	4,800	4,700
(% change)	+9	−3	−19	+4	−2
Walk-Behind Tillers	571	667	501	507	506
(% change)	−8	+17	−25	+1	–

SOURCE: OPEI survey of members in April, 1982. Data based on responses from 29 companies.

Demographic trends "working for us"





Source: The Conference Board, Consumer Research Department

The above data, and other tables of economic and demographic projections, were presented to OPEI members by Fabian Linden to help them evaluate future markets.

FRAZIER AND FRIENDS PANEL— An OPEI convention innovation was this panel discussion by component suppliers, monitored by Warner Frazier, center, the new president of the associaiton. The panelists were: (left to right) Michael E. Bukaty, Wescon Products; John F. Gray, Southern Mills; James M. Kadous, Whirltronics; and, James F. Sullivan, Briggs & Stratton Corp.

■The annual industry outlook conducted by the Outdoor Power Equipment Institute includes the projection that shipments of walk-behind mowers for the current model year will show a slight increase over the 1981 model year, but will drop again in 1983.

The industry outlook is one of the featured presentations of the annual meeting of the OPEI, where members unite to evaluate markets, government regulations and other common interests.

The forecast for lawn tractor riding mower shipments represented a three percent gain from the projected shipment of 628 thousand units for the current model year. The projections for the current model year called for slight increases in shipments of riding garden tractors, lawn tractors/riding mowers, and walk-behind tillers.

The projections for the shipments for the current year and the forecast for 1983 were based on a survey conducted among OPEI member companies in April of this year. Twenty-nine responses were averaged to obtain the data presented in the table.

The meeting of the OPEI, at the La Costa Hotel & Spa, Carlsbad, Calif., was held in late June, on the eve of the implementation of the new CPSC regulations governing design of walk-behind mowers.

OPEI role cited

Dennis Dix, executive director of the OPEI, reminded the assembled members that despite the burden imposed by the new mandatory safety measures, they should not overlook two major victories the past year: the date for implementation of the standard was delayed for six months—to June 30, 1982: and they were given a third option—the extended rope start as a means to comply with the new regulation. Prior to the extended rope start, they had only two higher-cost options—the blade-brake clutch and the electric alternator starter.

Dix asked the OPEI members to cooperate in an industry effort to control product liability costs, and in providing information on types of mowers they will be producing to meet the safety standard.

Concern about liability

Tom Shannon, legal counsel for the OPEI, warned the members that in the consumer area, claimants' attorneys may be trying to match one safety device against the other, or to compare the non-compliance mowers and the compliance mowers. "We don't want to get into a situation where we will be whipsawed between the old and the new," he said. "The small and middle-size retailer is going to pass liability cases back to the manufacturer, and the manufacturer will involve the component makers. The component makers should be sure that the product is well-engineered." He added that the repairman who installs a component will be liable if he installs a faulty component, but eventually the case would be "backed up to the manufacturer."

He told the manufacturers that the retailers and the consumers should be advised that to attempt to bypass the safety system on mowers "is a dangerous thing to do. You've got to warn them against it."

The number of product liability cases in federal courts has tripled in the last five years, Shannon said. He stressed these additional points: the OPEI plans to establish a library on product liability cases; product liability is so complex that manufacturers should seek out experienced specialists in product liability cases; he supports a uniform act governing product liability to replace the diverse state laws now in place.

Chairperson Steorts speaks

The CPSC will start a survey of compliance mowers in 1983 to evaluate consumer attitudes regarding the new units. Results of the survey will have an effect on the 2-year amendment on the mandatory standard.

The chairperson of the CPSC, Nancy Harvey Steorts, told the manufacturers: "A major new direction I will encourage by the CPSC is product safety education." She said that previously the emphasis had been on product recall. An example of safety education was the campaign during the last Christmas shopping season when toy manufacturers joined in development of a program encouraging shoppers to get "the right toy for the right child."

"We developed a program in January and February on the proper use of wood-burning stoves, in conjunction with the Wood Heating Alliance. I have totally changed our office of information. I have put in a director of public affairs for outreach to the media. We can start changing consumer behavior. It is truly working," Steorts said.

"We will do everything we can to help develop voluntary standards. But, if industry is unwilling or unable to correct problems, we will take action on mandatory standards." She said that the CPSC's current budget of $32.9 million is too little. "But, I think we can do a lot. If they (the commissioners) want to get re-authorized, they've got to get their priorities in order. I've got the trump card: reauthorization."

As an example of current actions that the CPSC has taken, the chairman mentioned the recent CPSC-

continued...

OPE Outlook

...continued

authorized recall of tillers marketed by Sears and Roper.

There was some discussion at the meeting of the Reagan administration's abolishing the CPSC and delegating its work to the Department of Commerce or other department.

OPEI members knowledgeable about the Washington scene are watching closely to see who will replace David Pittle, one of the original members of the board, whose term is expiring. Pittle, they say, has been a powerful influence on the board. He will take a position with Consumers Union when he leaves the CPSC, it was stated. An engineer, Pittle has been biased against the extended rope start (ERS). That is the lowest cost design that permits mowers to comply with the 3-second blade stop. Equipping the mower with a blade-brake clutch or an electric restart system will add considerably more to the price of a mower than adding an ERS.

Component suppliers as panelists

Warner C. Frazier, the newly elected president of the OPEI, was the moderator of a panel of component suppliers who took a look at issues and opportunities facing the industry. The consensus seemed to be that they are expecting a "replenishment and replacement market" rather than a growth market. They foresee increased operating costs, much of it due to increased energy costs.

Fifty percent of the component controls for outdoor power equipment manufactured in the United States are imports from Taiwan and India. "In the aftermarket, we can't compete with their dollar-an-hour people when we are paying $7 and $8 labor for wiring and other controls," said one of the panelists.

It was stated that American Honda has set up warehouses with six or seven men working out of each, using one-step distribution to sell to key accounts: landscapers, rental yards, service centers; and, that to compete with this strategy, more manufacturers will have to eliminate steps in distribution.

"We don't think they're only after the higher-end lawn mower market. We think they (Honda salesmen) will be walking into the mass retailers within two or three years," said one of the panelists, James F. Sullivan, vice president sales, Briggs & Stratton Corp.

Regulatory Policy Restated

Nancy Steorts

The following comments by Chairperson Steorts before the OPEI members underscored her commitment to "responsible regulatory reforms."

"We will give industry every reasonable opportunity to address product safety problems itself, but when there are serious problems and industry is unwilling or unable to correct them, it becomes our responsibility to take action that will protect consumers from unreasonable risks.

"In a meeting I had with Vice President Bush in April, he emphasized the Administration's commitment to responsible regulatory reforms. He encouraged voluntary standards development, but acknowledged that he would support the promulgation of mandatory standards, if mandatory standards are necessary. He stressed that our present Administration will regulate – but will do it better and more fairly...

"The Commission routinely attempts to obtain remedial action voluntarily from firms. If voluntary cooperation is not forthcoming, then the Commission uses its mandatory authority. For example, the Commission recently authorized its staff to issue an administrative complaint against Sears, Roebuck and Co., a Chicago-based firm, and Roper Corp., a manufacturer located in Illinois. The staff is seeking a determination that certain roto-tillers manufactured and distributed by those firms present a substantial product hazard. The staff also has alleged that the firms failed to timely report information required under Section 15 of the Consumer Product Safety Act.

"Charges in the complaint will be heard before an administrative law judge and the decision, of course, may be appealed to the Commission.

"Fortunately for all concerned – the consumer, the businessman, the Commission – such action as I've just described is extremely rare. Our authority encourages businesses to move on their own to improve the product safety climate by adopting and adhering to voluntary safety standards and by detecting and immediately correcting defective products. And we've been fortunate in working with a number of firms in an extremely cooperative atmosphere...."

Another issue discussed by the panelists was the difficulty in forecasting the quantities of components and of equipment to produce. "People want to live from hand-to-mouth, therefore it is harder to predict (production needs)." said Frazier.

Suburban growth: a powerful tide

The executive director of the Consumer Research Center of The Conference Board, Dr. Fabian Linden, told the manufacturers that the 1980's will be a period of rapid household formations and that growth of the suburbs will continue to be a "powerful tide" in the next 10 years.

Linden admits that these are not "times that encourage optimistic economic expectations; but due to the swelling numbers of new family formations, as we look beyond our immediate troubles, the future does seem promising."

And, the concluding conference of the annual meeting was on "People Productivity in the Real World." The speaker, Barry H. Minkin, a management consultant of SRI International, took a world view in speaking to the manufacturers: "I consult and advise the Japanese, the Europeans, the Latin Americans; and I think we have tough times ahead. He said he would share his "tool kit" that he uses to help nations and corporations improve human relations and productivity. "People" is a management area that often is taken for granted, he stressed, urging better understanding of factors that motivate personnel.

Minkin concluded on this upbeat note, "We're still the most productive country in the world even though our increase in productivity has slowed. We *can* get stuff out the door." □

A report on the new officers heading the OPEI is included in Power Equipment Highlights in this issue.

Product Movement Report

Data presented here show how retailers rate the 1982 Spring selling season compared to the 1981 season. The numbers represent percentage of retailers reporting sales up or down, and do not represent percentages of changes in sales volume.

■The number of retailers reporting sales of lawn and garden products in the season just completed as being "about the same" as the 1981 spring selling season indicates a relatively flat sales curve for the year. However, there were more retailers reporting increased sales than reported decreased sales in seven of the eight key product categories measured.

For the majority of those responding to the survey, sales volume was either increased, or "about the same," compared to 1981, for these product categories: lawn fertilizer, grass seed, packet seed, garden tools, walk-behind mowers, riding mowers/garden tractors, and power equipment replacement parts.

The data show that there even was a boom in sales of replacement parts for outdoor power equipment, in all parts of the country.

Rotary tillers was the only product category that showed decreased volume. Thirty-five percent of the respondents in the survey said sales of tillers were down and only six percent said sales were up. Twenty-seven percent of the respondents said that tiller sales were down 20 percent or more.

Wide gain for packet seeds

But sales of packet seeds were up substantially, indicating the continuing boom in vegetable gardening: nationwide, 42 percent of the respondents said that packet seeds sales were up, and only four percent said they were down. The North Central states' retail respondents reported the most consistent sales growth in this category. The sales of garden tools was flat across the country, with the regional breakdown for those reporting sales "about the same" being as follows: Northeast, 60 percent; North Central, 38 percent; South, 44 percent; and West, 50 percent.

Rain helps mower sales

The unusually heavy and regular rainfall in many markets helped to spur the sales of mowers; and both walk-behinds and riders showed some increase. With 26 percent of the retailers of walk-behinds reporting an increase in sales and only 16 percent reporting a decrease, and 33 percent reporting sales as "about the same," there is good reason to expect that dealer inventories are being reduced. The price resistance that the consumer has been putting up against all higher ticket items is reflected in the sales of riding mowers and lawn tractors, but according to data from this survey, the riders and lawn tractors fared slightly better, overall, than they did in 1981. (No attempt was made to obtain data on sales of garden tractors, but other sources report that sales are down this year, compared to 1981, due to consumer price resistance.) Also, in the survey, many respondents listed garden tractors as a product category that had sales below expectations.

continued...

Despite these comments, however, there have been reports of good sales of these high-ticket items by some companies and in some geographical areas. And, even though tiller sales are down, in general, one home center chain reports that sales of a new line of rear-tine tillers are good despite the fact that it carries a higher retail price.

The problem-solving products, like gypsy moth control products in the Northeast, continued to yield good sales volume this year, judging from items listed by respondents as producing "exceptionally good sales." □

Percentage of Retailers Reporting Change

— Spring '82 vs. Spring '81 —

		Total	Northeast	N. Central	South	West
Lawn Fertilizer	Up	22.8%	25.9%	21.4%	21.1%	24.2%
	Same	33.3	36.2	37.2	26.3	36.4
	Down	18.2	20.7	15.7	13.2	30.3
Grass Seed	Up	22.3	31.0	22.9	18.4	15.2
	Same	35.9	39.7	40.0	26.3	42.4
	Down	15.6	17.2	12.9	13.2	24.2
Packet Seed	Up	42.3	37.9	51.6	34.8	45.5
	Same	35.9	41.4	20.7	39.1	54.5
	Down	4.4	6.9	7.0	.....	.....
Garden Tools	Up	23.1	20.0	19.1	26.5	31.8
	Same	48.2	60.0	38.1	44.1	50.0
	Down	13.3	11.1	14.2	14.7	13.6
Walk-behind Mowers	Up	26.4	28.6	31.5	22.9	16.7
	Same	33.0	26.8	31.5	37.4	36.6
	Down	16.1	19.6	13.1	16.8	16.7
Riding Mowers/Lawn Tractors	Up	24.8	22.5	29.1	23.6	15.8
	Same	25.2	25.0	29.1	19.4	31.5
	Down	21.9	22.5	21.5	25.1	10.6
Rotary Tillers	Up	6.1	7.4	2.0	6.7	25.0
	Same	35.3	18.5	41.1	43.3	25.0
	Down	35.3	33.3	37.3	30.0	50.0
Replacement Parts (OPE)	Up	64.7	77.8	60.8	63.4	50.0
	Same	31.0	22.2	33.3	33.3	37.5
	Down	1.8	.....	3.9	.....	12.5

New data on foliage markets

A FOREIGN MARKET DEVELOPMENT REPORT, "European Market Potential for United States Tropical Ornamental Foliage Plants," has been completed through the Florida Nurserymen and Growers Assn. and the U.S. Department of Agriculture, Foreign Agriculture Service. It was written by FNGA's Executive Vice President Charles W. Dunn.

Initiated by the FNGA Foliage Division about one year ago, the report is part of a promotional effort by the association and the USDA/FAS to expand international marketing opportunities for the United States/Florida tropical ornamental plant products.

The report states that "While there is interest in this plant material, quality and continuity of supply would be key elements in successfully developing this market in the European marketplace." Contents also include sections on organization of the European market survey, survey findings (including economic conditions affecting European producers, purchases and preferences of European consumers, governmental regulations and relations and potential for U.S./Florida growers), the European horticultural industry, U.S. nursery industry, Florida nursery industry; and Holland, focal point of international horticulture trade.

THE 1979 CENSUS OF HORTICULTURAL SPECIALTIES, recently released, shows that goings-on in the plant industry have taken some interesting twists, according to Alvi O. Voigt, marketing specialist, cooperative extension service, U.S. Department of Agriculture, Pennsylvania State University.

The accompanying table shows foliage in last place in 1959, with a 9.6 percent share of the market. In 1970 it had an even lower share of 8.4 percent, but it increased more than twelve-fold from 1970 to 1979. It then became number one in the industry with a 30.6 percent share in 1979.

The industry rate-of-advance from 1959 to 1970 was 70 percent. The seventies saw the total industry climb more than three-fold (234%), unadjusted for inflation. The outstanding increase was for foliage. Daily and weekly sales of foliage increased throughout the year, in convenient locations and other outlets, at cash-and-carry prices and highly-serviced prices, in small 2¼ unit sales and for large plantscaping jobs, and to a variety of customers, especially young people, who are becoming more appreciative of nature and their environment.

Bedding plants had increased sales for many of the same reasons. Bedding represents about a two-month season, not year around as for foliage, which means bedding has done the best ($285,520,000 divided by two months is $142,760,000 per month, versus foliage's $466,913,000 divided by 12, which averages $38,909,417 per month). Bedding plants also have two markets, flowers and vegetables, each exhibiting strong demand, but having distinctly different market behavior. Flowering bedding plants probably have better, steadier potential, according to Voigt.

U.S. floricultural production (Producer value in thousands of dollars)

	1959	(Percent Share)	1970	(Percent Share)	Percent Change '59-'70	1979	(Percent Share)	Percent Change '70-'79
Pot Plants	$ 64,469	(25.9)	$125,826	(27.6)	+81%	$418,007	(27.4)	+232%
Cut Flowers	140,207	(52.3)	229,944	(50.5)	+64	353,415	(23.2)	+54
Bedding Plants	32,844	(12.2)	61,627	(13.5)	+88	285,520	(18.7)	+363
Foliage	25,607	(9.6)	38,376	(8.4)	+50	466,913	(30.6)	+1117
Totals	$268,127	(100%)	$455,773	(100%)	+70%	$1,523,855	(99.9%)	+234%

September 30, 1982

Lawn&Garden Marketing

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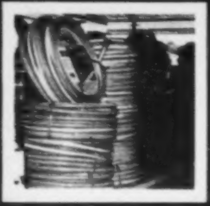

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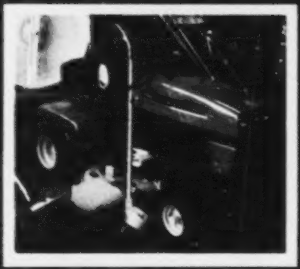

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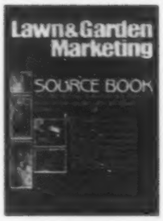
Lawn&Garden Marketing®

The merchandising magazine for lawn, garden and leisure living products



SOURCE BOOK

About the cover: The quick-reference cover gives users of the Source Book easy access to information about the products and companies they are seeking. For a more detailed guide to products, see listings below.

Eight Product Sections

26 **Power Equipment.** This section includes the basics – all power equipment, including gasoline and electric powered equipment and tools. It also incorporates equipment parts and accessories, and tools and supplies for equipment maintenance shops.

32 **Non-Power Tools.** A complete listing of home gardeners' and lawn care tools, including some non-powered wheel goods.

33 **Watering Products.** This section includes conventional hose, sprinklers and accessories plus drip-, trickle- and underground irrigation components and systems.

34 **Packaged Products.** Chemicals, fertilizers, potting soil, soil amendments, mulches, etc. are included here.

37 **Nursery Goods** – All types of green goods: plants, seed, sod and bulbs.

38 **Maintenance Accessories.** A wide selection of aids for home landscaping, gardening and patio living.

39 **Indoor Products.** Accessories and supplies for indoor plants and indoor gardening, as well as Christmas lights and other decor items are listed here.

40 **Patio and Ornamental Products.** Items to equip the patio and outdoor areas for eating, entertaining are listed including cooking equipment and decorative products.

Guide to Products Advertised .... page **2**

COMPANIES, ASSOCIATIONS, EVENTS

Trade Associations. Includes national and regional associations serving manufacturers and growers, retailers and wholesale distributors ... page 8

Calendar of Events. A listing of national, regional and international trade events through October, 1983 .... page 16

Manufacturers and Growers (company addresses) .... page 42

Wholesale Distributor Listings (50 States and Canada). Includes specialty wholesalers – lawn and garden, power equipment, chemicals and fertilizers, hardware .... page 52

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12942, Overland Park, KS 66212-0930.

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WEATHER

Average Percentage of Possible SUNSHINE

Data through 1977	Yrs.	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Ann.
Montgomery, Ala.	27	48	54	57	65	66	66	63	66	63	66	56	50	59
Anchorage, Al.	24	42	44	55	52	53	48	45	42	41	40	38	33	46
Flagstaff, Ariz.	4	75	72	69	84	89	90	75	81	82	78	77	78	81
Phoenix, Ariz.	82	78	80	83	88	93	94	85	85	89	88	84	77	86
Little Rock, Ark.	32	46	54	57	61	68	73	71	73	68	69	56	48	63
Los Angeles, Calif.	32	69	72	73	70	66	65	82	83	79	73	74	71	73
San Diego, Calif.	37	72	72	71	65	58	56	87	69	68	67	74	71	67
San Francisco, Calif.	38	56	62	69	73	72	73	66	65	72	70	62	53	67
Denver, Colo.	28	72	71	70	66	65	71	71	72	74	73	66	68	70
Washington, D.C.	29	49	52	56	58	59	64	63	63	62	59	52	47	58
Key West, Fla.	19	72	76	82	85	80	73	77	77	71	70	72	73	76
Tampa, Fla.	31	65	67	71	74	74	65	61	59	60	64	65	62	66
Atlanta, Ga.	42	48	54	57	66	68	67	62	65	63	67	59	50	61
Honolulu, Hawaii	25	63	65	68	66	69	70	73	75	74	67	60	59	67
Chicago, Ill.	35	44	47	52	54	61	67	70	68	63	61	41	38	57
Indianapolis, Ind.	34	42	51	52	56	62	67	70	71	66	64	43	40	58
Des Moines, Iowa	27	51	54	54	56	60	67	72	69	64	63	50	45	60
Louisville, Ky.	30	42	47	51	55	62	66	66	68	64	62	47	40	57
New Orleans, La.	4	47	65	53	69	58	69	58	55	63	68	53	53	60
Baltimore, Md.	27	52	55	55	56	57	62	65	62	60	59	51	48	57
Boston, Mass.	42	54	56	57	57	59	63	66	67	63	61	51	52	60
Detroit, Mich.	32	32	43	49	52	59	65	70	65	61	56	35	32	54
Minneapolis, Minn.	39	50	57	54	56	59	63	71	67	61	57	39	40	58
Kansas City, Mo.	5	62	61	65	72	74	76	82	68	57	64	53	59	67
St. Louis, Mo.	18	54	53	56	57	62	68	72	65	63	63	49	43	59
Great Falls, Mont.	35	48	57	67	62	64	65	80	77	68	61	46	45	63
Omaha (North), Neb.	41	55	55	55	58	62	68	75	72	67	67	52	49	62
Las Vegas, Nev.	28	78	81	83	86	88	92	87	88	92	86	81	78	86
Atlantic City, N.J.	17	50	51	53	55	55	58	60	63	58	56	49	43	55
Albuquerque, N.M.	38	73	73	74	76	80	83	76	76	80	79	78	72	77
Albany, N.Y.	39	46	51	52	53	55	59	63	61	56	52	36	38	53
New York, N.Y.	100	50	55	56	59	61	64	65	64	63	61	52	49	59
Charlotte, N.C.	27	55	60	63	70	69	70	69	70	68	69	63	58	66
Bismarck, N. Dak.	38	54	55	60	59	63	64	76	73	65	59	45	47	62
Columbus, Ohio	26	37	42	44	52	58	61	63	63	61	57	38	31	52
Oklahoma City, Okla.	23	59	61	63	63	65	73	75	77	69	68	60	59	67
Portland, Ore.	28	25	36	43	50	55	52	69	63	59	41	29	20	48
Philadelphia, Pa.	35	51	54	56	57	57	62	63	63	59	59	52	49	58
Pittsburgh, Pa.	42	26	31	40	45	50	53	53	50	52	45	30	23	42
Charleston, S.C.	19	57	61	66	71	71	66	67	64	62	67	65	59	65
Rapid City, S. Dak.	35	55	60	61	59	57	61	72	73	68	66	56	54	62
Memphis, Tenn.	27	49	55	57	64	70	74	73	76	69	71	58	50	65
Austin, Texas	36	49	53	55	53	57	69	76	75	67	65	57	51	61
El Paso, Texas	35	78	82	85	87	89	89	79	80	82	84	83	78	83
Houston, Texas	8	45	56	45	52	59	65	67	62	60	61	55	65	57
Salt Lake City, Utah	40	48	56	64	67	73	79	84	83	84	73	54	45	70
Burlington, Vt.	34	42	48	51	51	56	60	65	62	54	50	30	33	51
Richmond, Va.	27	51	56	59	63	63	66	65	64	63	59	56	51	60
Seattle, Wash.	31	28	34	42	47	52	49	63	56	53	37	28	23	45
Milwaukee, Wis.	37	45	47	51	54	59	64	71	67	60	56	41	38	56

Source: U.S. Dept. of Commerce Comparative Climatic Data

Your source for over 4,000 replacement parts for lawnmowers, chain saws, and small engines.

- *Throttle Controls & Accessories* ....
- *Wheels, Tires & Accessories* .
- *Chain, Centrifugal Clutches & Sprockets* ....
- *Belts, Pulleys & Idlers* ....
- *Monofilament Heads & Line* ..
- *Blades, Tips & Edger Blades* ..
- *Grass Bags & Catchers* ....
- *Blade Adapters & Accessories* ....
- *Edger Shafts & Pulleys* ....
- *Mufflers & Deflectors* ....
- *Spark Plugs, Boots & Shorting Clips* ....
- *Starter Rope & Handles* ....
- *Starter Springs & Accessories* ....
- *Fuel Line, Fittings & Filters* ....
- *Air Filters, Foam & Paper* .....
- *Carburetor Kits & Diaphragms* ....
- *Internal Engine Parts* ....
- *Lawnmower & Tractor Seats*
- *Ignition & Tune-Up Kits* ....
- *Solid State Ignition* ....
- *Shop Tools & Accessories* ....
- *O.E.M. Cross Reference* ......
- *Chain Saw Carburetor Repair Parts* ....
- *Chain Saw Filters* ....
- *Chain Saw Starter Accessories* ....
- *Chain Saw Bars* ....
- *Chain Saw Chain* ....
- *Chain Saw Sprockets* ....
- *Chain Saw Starter Springs* ....
- *Chain Saw Shop & Work Accessories* ....
- *Chain Saw Files* ....

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Yard Broom
Barbecue Grill Brush

Two very sound reasons to sell Wright-Bernet lawn and garden brushes!

Now, you can add a high profit line of yard and patio brushes that already have a track record as top sellers in the hardware business. Many lawn and garden retailers are already taking advantage of this consumer popularity . . . and you can too! An example is the Monarch . . . it has a unique brace that gives this brush the necessary rigidity for heavy duty usage on driveways, yards and patios . . . it can even be used for light snow removal and that's one reason why it's a year round seller. Another example is the fast moving Barbecue Grill Brush . . . it has a notched scraper and wire bristles that make it a favorite with outdoor cooks.

Want these extra sales and profits? Contact your Wright-Bernet wholesaler or us.

WRIGHT QUALITY BRUSHES **BERNET**
1524 Bender Ave. Hamilton, Oh. 45011

Circle (6) on Reply Card

WEATHER

1982-83 snowfall predictions

CITY	FIRST SNOWFALL 1982 Month, Day	LAST SNOWFALL 1983 Month, Day	TOTAL SNOWFALL 1982/83
Anchorage, Alaska	Oct. 1	Apr. 9	68.7
Flagstaff, Arizona	Oct. 31	Apr. 14	107.1
Colorado Springs, Colo	Oct. 23	Apr. 7	33.8
Denver, Colo.	Oct. 15	Apr. 11	65.7
Grand Junction, Colo.	Nov. 9	Mar. 27	19.2
Bridgeport, Conn.	Nov. 7	Apr. 4	21.2
Hartford, Conn.	Oct. 20	Mar. 29	41.2
Wilmington, Delaware	Nov. 6	Apr. 3	17.2
Washington, D C.	Nov. 6	Mar. 31	17.8
Boise, Idaho	Nov. 22	Mar. 28	18.8
Chicago, Illinois	Nov. 6	Apr. 7	40.3
Moline, Illinois	Oct. 25	Apr. 4	28.5
Peoria, Illinois	Nov. 7	Apr. 8	26.8
Rockford, Illinois	Oct. 21	Apr. 6	31.3
Springfield, Illinois	Nov. 8	Apr. 8	24.9
Fort Wayne, Indiana	Oct. 26	Apr. 4	38.1
Indianapolis, Indiana	Nov. 1	Apr. 5	24.5
South Bend, Indiana	Oct. 18	Apr. 3	82.1
Des Moines, Iowa	Oct. 23	Apr. 4	32.3
Sioux City, Iowa	Oct. 24	Apr. 3	29.0
Waterloo, Iowa	Oct. 20	Apr. 3	29.2
Topeka, Kansas	Nov. 6	Apr. 9	16.6
Wichita, Kansas	Nov. 12	Apr. 11	11.5
Lexington, Ky.	Nov. 22	Apr. 1	12.3
Louisville, Ky.	Nov. 7	Apr. 17	12.7
Caribou, Maine	Oct. 1	Apr. 10	140.1
Portland, Maine	Nov. 4	Apr. 1	90.8
Baltimore, Maryland	Nov. 6	Apr. 3	16.8
Boston, Mass.	Nov. 5	Apr. 6	38.0
Worcester, Mass.	Oct. 22	Apr. 3	89.3
Detroit, Mich.	Oct. 19	Apr. 9	42.7
Flint, Mich.	Oct. 11	Apr. 12	44.3
Grand Rapids, Mich.	Oct. 19	Apr. 7	87.8
Houghton Lake, Mich.	Oct. 10	Apr. 9	110.0
Lansing, Mich.	Oct. 11	Apr. 11	47.1
Sault Ste. Marie, Mich.	Oct. 4	Apr. 8	145.0
Duluth, Minn.	Oct. 2	Apr. 8	91.9
International Falls, Minn.	Oct. 2	Apr. 5	59.3
Minneapolis-St. Paul	Oct. 20	Apr. 6	43.6
Rochester, Minn.	Oct. 16	Apr. 11	41.1
Columbia, Missouri	Nov. 8	Apr. 9	22.5
Kansas City, Missouri	Nov. 8	Apr. 8	18.0
St. Louis, Missouri	Nov. 16	Apr. 1	20.9
Springfield, Missouri	Oct. 29	Apr. 9	17.8
Billings, Montana	Oct. 5	Apr. 16	55.6

Snowfall listed in inches

continued on page 12

Why break your back?

Let YardBird do the lifting!

Stay healthy! Let YardBird do all your lifting! Name anything that weighs 500 lbs. or less, and YardBird can lift it with ease.

YardBird lifts heavy objects to a height of nearly seven feet . . . into trucks, car trunks, station wagons, and onto shelves, work benches and tables. Great for stacking heavy objects in yards, plants, warehouses, showrooms, wherever!

And YardBird disassembles quickly into two sections for ease of transporting and storing. It reassembles just as quickly and easily. Call the BlueBird Action Center today for information. BlueBird International 2778 South Tejon, Englewood, Colorado 80110. Phone (303) 781-4458. Today!

BlueBird® International

Circle (10) on Reply Card

Snowfall predictions

continued from page 6

CITY	FIRST SNOWFALL 1982 Month, Day	LAST SNOWFALL 1983 Month, Day	TOTAL SNOWFALL 1982/83
Great Falls, Montana	Oct. 13	Apr. 2	56.3
Helena, Montana	Oct. 15	Apr. 6	39.9
Missoula, Montana	Oct. 20	Mar. 27	40.8
Grand Island, Nebraska	Oct. 24	Apr. 5	27.3
Lincoln, Nebraska	Oct. 24	Apr. 6	24.1
Omaha, Nebraska	Oct. 24	Apr. 8	23.8
Scottsbluff, Nebraska	Oct. 14	Apr. 9	31.7
Reno, Nevada	Oct. 15	Apr. 7	20.0
Concord, New Hampshire	Oct. 30	Apr. 3	64.3
Mt. Washington, N.H.	Oct. 7	Apr. 16	219.2
Atlantic City, N.Y.	Oct. 30	Apr. 16	12.3
Newark, N.J.	Nov. 1	Apr. 3	25.7
Albany, N.Y.	Nov. 3	Apr. 2	62.2
Binghamton, N.Y.	Oct. 15	Apr. 8	94.3
Buffalo, N.Y.	Oct. 10	Apr. 14	105.4
New York City, N.Y.	Nov. 11	Apr. 6	25.6
Rochester, N.Y.	Oct. 19	Apr. 5	94.9
Syracuse, N.Y.	Oct. 15	Apr. 10	115.1
Asheville, N.C.	Nov. 26	Mar. 29	17.1
Charlotte, N.C.	Dec. 27	Mar. 23	5.1
Greensboro, N.C.	Dec. 16	Apr. 1	9.9
Raleigh, N.C.	Dec. 27	Mar. 23	6.9
Bismarck, N.D.	Oct. 20	Apr. 1	35.4
Fargo, N.D.	Oct. 13	Apr. 3	32.3
Akron-Canton, Ohio	Oct. 18	Apr. 7	48.7
Cincinnati, Ohio	Nov. 3	Apr. 8	21.5
Cleveland, Ohio	Oct. 18	Apr. 6	59.8
Columbus, Ohio	Oct. 24	Apr. 6	29.7
Dayton, Ohio	Oct. 22	Apr. 7	27.4
Mansfield, Ohio	Oct. 18	Apr. 3	44.9
Toledo, Ohio	Oct. 19	Apr. 5	41.0
Youngstown, Ohio	Oct. 18	Apr. 10	54.7
Oklahoma City, Okla.	Nov. 26	Apr. 7	7.2
Tulsa, Okla.	Dec. 2	Apr. 6	6.3
Eugene, Oregon	Nov. 30	Mar. 28	4.8
Medford, Oregon	Dec. 5	Mar. 26	5.8
Portland, Oregon	Dec. 12	Apr. 13	4.7
Salem, Oregon	Nov. 16	Mar. 23	4.4
Allentown, Pa.	Oct. 30	Apr. 2	31.3
Wilkes, Barre, Scranton, Pa.	Oct. 24	Apr. 4	50.2
Erie, Pa.	Oct. 8	Apr. 14	100.2
Harrisburg, Pa.	Nov. 6	Mar. 31	34.3
Philadelphia, Pa.	Nov. 5	Apr. 6	20.1
Pittsburgh, Pa.	Oct. 18	Apr. 7	46.1
Providence, R.I.	Oct. 20	Mar. 30	33.6

continued on page 24

OUR PRIORITY
ON-TIME DELIVERY

"I'm sorry, we are waiting for our delivery". An excuse guaranteed to lose customers. But with *LAMBERT* you can forget that excuse because *LAMBERT* delivers Sphagnum Peat Moss when you want it, where you want it. Delivery of our Sphagnum Peat Moss is a **PRIORITY,** a full-time job at *LAMBERT* because we know that late delivery means lost customers, lost sales. Year-round, we provide the best delivery in the industry so you can sell to your customers without needing excuses.

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WEATHER

Mean number of days with precipitation 0.01 inch or more

Data through 1977	Yrs.	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Ann.
Montgomery, Ala.	33	11	9	11	8	8	9	12	9	8	5	8	10	108
Anchorage, Al.	13	7	9	8	7	6	8	11	12	14	12	9	11	114
Flagstaff, Ariz.	28	6	6	7	6	4	3	12	11	6	5	5	6	77
Phoenix, Ariz.	38	3	4	3	2	1	1	4	5	3	3	2	4	35
Little Rock, Ark.	35	10	9	11	10	10	8	9	7	7	6	8	9	104
Los Angeles, Calif.	37	6	5	6	4	1	1	.....	1	1	2	3	5	35
San Diego, Calif.	37	6	6	7	5	2	1	.....	.....	1	2	5	6	41
San Francisco, Calif.	41	11	10	10	6	3	1	1	1	1	4	8	10	66
Denver, Colo.	43	6	6	8	9	10	9	9	8	6	5	5	5	86
Washington, D.C.	36	10	9	11	10	11	9	10	9	8	7	8	9	111
Key West, Fla.	29	6	5	5	4	8	12	13	15	16	12	7	7	110
Tampa, Fla.	31	6	7	7	5	6	12	16	17	13	7	5	7	108
Atlanta, Ga.	43	11	10	12	9	9	10	12	9	7	6	8	10	113
Honolulu, Hawaii	28	10	10	9	9	7	6	8	7	7	9	10	10	102
Chicago, Midway Ap Ill.	35	11	10	13	13	12	10	9	8	9	8	10	11	124
Indianapolis, Ind.	38	11	10	13	12	12	10	9	8	8	8	10	12	123
Des Moines, Iowa	38	7	7	10	10	11	11	9	9	9	7	6	7	103
Louisville, Ky.	30	12	11	13	12	11	10	11	8	8	7	10	11	124
New Orleans, La.	29	10	9	9	7	7	10	15	13	10	6	7	10	113
Baltimore, Md.	27	10	9	11	11	11	9	9	10	7	7	9	9	112
Boston, Mass.	26	12	11	12	11	11	11	9	10	9	9	11	12	128
Detroit, Mich.	35	13	12	13	12	12	11	9	9	9	9	11	13	133
Minneapolis, Minn.	39	9	7	10	10	12	12	10	10	9	8	8	9	114
Kansas City, Mo.	5	9	6	11	10	11	9	5	8	10	8	7	8	102
St. Louis, Mo.	20	8	8	11	11	11	9	9	7	9	8	8	10	109
Great Falls, Mont.	40	9	8	9	9	11	12	7	7	7	6	7	8	100
Omaha, Neb.	42	7	7	9	9	12	11	9	9	8	6	5	6	98
Las Vegas, Nev.	29	3	2	2	2	1	1	3	3	2	2	2	2	25
Atlantic City, N.J.	34	11	10	11	11	10	9	9	9	8	7	9	10	114
Albuquerque, N.M.	38	3	4	4	3	4	4	9	10	6	5	3	4	59
Albany, N.Y.	31	12	11	12	12	13	11	11	10	10	9	12	13	136
New York, N.Y.	109	11	10	12	11	11	10	11	10	8	8	9	10	121
Charlotte, N.C.	38	10	10	12	9	9	10	12	9	7	7	7	10	112
Bismarck, N. Dak.	38	8	7	8	8	10	12	9	8	7	5	6	8	96
Columbus, Ohio	38	13	12	14	13	13	11	11	9	9	8	11	13	137
Oklahoma City, Okla.	38	5	6	7	8	10	9	7	6	7	6	5	5	81
Portland, Ore.	37	19	16	17	14	12	9	4	5	7	13	18	19	153
Philadelphia, Pa.	37	11	9	11	11	11	10	9	9	8	7	9	10	115
Pittsburgh, Pa.	43	15	14	15	13	13	12	11	9	9	10	12	14	147
Charleston, S.C.	35	10	9	11	7	9	11	14	13	9	6	7	9	115
Rapid City, S. Dak.	35	7	7	9	10	12	13	9	8	6	5	6	6	98
Memphis, Tenn.	27	10	10	11	10	9	8	9	8	7	6	8	10	106
Austin, Texas	36	8	8	7	8	8	6	5	5	7	6	7	7	82
El Paso, Texas	38	4	3	2	2	2	3	8	7	5	4	2	4	46
Houston, Texas	8	11	6	10	7	8	7	10	11	10	8	8	9	105
Salt Lake City, Utah	49	10	9	10	10	8	6	4	5	5	6	7	9	89
Burlington, Vt.	34	14	12	13	12	13	12	12	12	12	11	14	15	152
Richmond, Va.	40	10	9	11	9	11	10	11	10	8	7	8	9	113
Seattle, Wash.	27	20	16	17	13	10	9	5	6	8	10	18	20	152
Milwaukee, Wis.	37	11	9	12	12	12	11	10	9	9	9	10	11	125

Source: U.S. Dept. of Commerce Comparative Climatic Data

VANDERMOLEN
windmill
highest quality Environmental Control Equipment . . . for better living

WHEELED BLOWER
2 cycle power & rpm.
less than 41 lbs.!
225 MPH wallop!

BUGKIL
electric
Insect Killer

BACK PACK BLOWER
a portable airblast that cleans up fast everywhere.

NO DRIFT HERBICIDE APPLICATOR
roller flattens weeds to deposit chemicals over greater leaf surface for better, quicker kill. No spray, no drift!

BACK PACK MISTBLOWER
gives fast, even coverage. Sprays to 40 ft. high. 3 & 6 gal. tanks. On shrubs, 10X mix covers ⅓ acre per gal.

BRUSH CHIPPER
chips up to 3" diam. wood with drumtype rotor 11 to 18 HP & PTO models.

SPREADER
swath to 60 ft. Holds 7-20 cu. ft. handles seed, sand, all fertilizers

GAS TRIMMERS
nylon line & metal blades

☐ Electric Bugkillers ☐ Trimmers
☐ Blowers ☐ Mistblower ☐ Spreader
☐ Herbicide Applicator ☐ Brush Chipper

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VANDERMOLEN CORP.
119 Dorsa Ave., Livingston, NJ 07039

Circle (19) on Reply Card

WEATHER

SNOWFALL

Average total in inches, including sleet

Data through 1977	Yrs.	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Ann.
Montgomery Ala.	33	0.3	0.1	T	0.0	0.0	0.0	0.0	0.0	0.0	0.0	T	T	0.4
Anchorage, Al.	34	10.8	11.9	9.3	5.7	0.6	0.0	0.0	0.0	0.3	6.6	10.1	14.9	70.2
Flagstaff, Ariz.	28	15.6	14.4	19.7	10.6	2.3	T	0.0	0.0	0.1	2.6	8.4	14.9	88.6
Phoenix, Ariz.	40	T	T	T	T	0.0	0.0	0.0	0.0	0.0	0.0	0.0	T	T
Little Rock, Ark.	35	2.2	1.2	0.6	T	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.9	5.1
Los Angeles, Calif.	37	T	T	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	T	T
San Diego, Calif.	37	T	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	T	T
San Francisco, Calif.	36	T	T	T	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	T	T
Denver, Colo.	43	8.0	7.8	12.7	9.5	1.5	T	0.0	0.0	1.8	3.8	7.7	6.2	59.0
Washington, D.C.	34	4.7	4.9	2.3	T	T	0.0	0.0	0.0	0.0	T	0.7	3.7	16.3
Key West, Fla.	29	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tampa, Fla.	31	T	T	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	T
Atlanta, Ga.	43	0.7	0.4	0.2	T	0.0	0.0	0.0	0.0	0.0	0.0	T	0.2	1.5
Honolulu, Hawaii	31	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chicago, Ill.	35	9.9	8.3	7.5	1.4	T	0.0	0.0	0.0	0.0	0.3	2.9	10.8	41.1
Indianapolis, Ind.	46	5.2	5.0	3.7	0.5	T	0.0	0.0	0.0	0.0	T	2.2	5.0	21.6
Des Moines, Iowa	38	8.5	7.0	6.8	1.6	T	0.0	0.0	0.0	T	0.1	2.7	6.4	33.1
Louisville, Ky.	30	5.4	4.2	3.8	0.2	0.0	0.0	0.0	0.0	0.0	T	1.6	2.4	17.6
New Orleans, La.	31	T	0.1	T	0.0	0.0	0.0	0.0	0.0	0.0	0.0	T	0.1	0.2
Baltimore, Md.	27	5.1	5.9	4.6	0.1	T	0.0	0.0	0.0	0.0	T	1.1	4.4	21.2
Boston, Mass.	42	12.2	11.8	8.1	0.7	T	0.0	0.0	0.0	0.0	T	1.2	8.1	42.1
Detroit, Mich.	38	7.9	7.7	5.4	1.1	T	0.0	0.0	0.0	0.0	T	2.5	7.1	31.7
Minneapolis, Minn.	39	9.2	8.3	10.7	2.5	0.2	0.0	0.0	0.0	T	0.4	5.8	9.0	46.1
Kansas City, Mo.	43	5.9	3.8	3.7	0.7	T	0.0	0.0	0.0	0.0	T	1.1	4.3	19.5
St. Louis, Mo.	41	4.6	4.1	4.4	0.2	T	0.0	0.0	0.0	0.0	T	1.5	3.7	18.5
Great Falls, Mont.	40	10.0	8.3	9.8	7.5	1.4	0.4	T	0.0	1.3	3.0	7.3	8.8	57.8
Omaha, Neb.	42	8.5	7.2	6.7	0.9	0.1	0.0	0.0	0.0	T	0.3	2.5	5.8	32.0
Las Vegas, Nev.	29	1.1	T	T	T	0.0	0.0	0.0	0.0	0.0	T	0.2	0.1	1.4
Atlantic City, N.J.	33	4.9	4.8	3.1	0.2	T	0.0	0.0	0.0	0.0	T	0.4	2.4	15.8
Albuquerque, N.M.	38	2.3	1.8	2.1	0.5	T	0.0	0.0	0.0	T	T	1.2	2.6	10.5
Albany, N.Y.	31	15.0	15.3	12.0	2.5	0.1	0.0	0.0	0.0	0.0	0.1	4.5	16.2	65.7
New York, N.Y.	109	7.6	8.6	5.2	0.9	T	0.0	0.0	0.0	0.0	T	0.9	5.8	29.0
Charlotte, N.C.	38	2.1	1.3	1.1	T	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.7	5.3
Bismarck, N. Dak.	38	7.0	5.9	7.9	3.7	1.0	T	0 0	0.0	0.2	1.3	5.0	6.7	38.7
Columbus, Ohio	30	7.5	5.8	4.9	0.7	T	0.0	0.0	0.0	T	0.1	2.8	5.9	27.7
Oklahoma City, Okla.	38	2.8	2.2	1.7	T	0.0	0.0	0.0	0.0	0.0	T	0.5	1.6	8.8
Portland, Ore.	37	4.2	0.7	0.6	T	T	0.0	0.0	0.0	T	T	0.4	1.5	7.4
Philadelphia, Pa.	35	5.7	5.9	3.7	0.2	T	0.0	0.0	0.0	0.0	T	0.7	4.0	20.2
Pittsburgh, Pa.	43	7.6	6.6	5.9	0.8	T	0.0	0.0	0.0	0.0	0.1	2.6	6.4	30.0
Charleston, S.C.	35	0.1	0.3	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	T	0.1	0.6
Rapid City, S. Dak.	35	5.4	6.3	9.6	6.2	0.8	0.1	0.0	0.0	0.1	1.7	4.3	4.8	39.3
Memphis, Tenn.	27	2.1	1.2	1.2	T	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.9	5.5
Austin, Texas	36	0.5	0.4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	T	T	1.0
El Paso, Texas	38	1.4	0.8	0.4	T	0.0	0.0	0.0	0.0	0.0	T	1.1	1.0	4.7
Houston, Texas	43	0.2	0.2	T	0.0	0.0	0.0	0.0	0.0	0.0	0.0	T	T	0.4
Salt Lake City, Utah	49	13.2	9.7	10.4	5.0	0.6	T	0.0	0.0	0.1	1.1	6.2	12.0	58.3
Burlington, Vt.	34	17.9	18.0	12.4	3.6	0.2	0.0	0.0	0.0	T	0.2	7.4	19.6	79.3
Richmond, Va.	40	5.2	3.3	2.8	0.1	0.0	0.0	0.0	0.0	0.0	T	0.4	2.1	13.9
Seattle, Wash.	27	3.9	0.8	0.8	T	T	0.0	0.0	0.0	0.0	T	0.5	2.3	8.3
Milwaukee, Wis.	37	12.2	9.0	9.5	1.8	T	0.0	0.0	0.0	T	0.1	3.1	10.2	45.9

Source: U.S. Dept. of Commerce
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Snowfall predictions

continued from page 12

CITY	FIRST SNOWFALL 1982 Month, Day	LAST SNOWFALL 1983 Month, Day	TOTAL SNOWFALL 1982/83
Greenville, Spartanburg, S.C.	Dec. 28	Mar. 24	5.3
Rapid City, S.D.	Oct. 19	Apr. 5	31.7
Sioux Falls, S.D.	Oct. 19	Apr. 7	29.6
Knoxville, Tenn.	Nov. 25	Mar. 31	10.3
Memphis, Tenn.	Dec. 3	Apr. 6	3.9
Nashville, Tenn.	Dec. 5	Apr. 2	8.8
Amarillo, Texas	Nov. 11	Apr. 3	12.2
Wichita Falls, Texas	Dec. 14	Apr. 8	4.7
Salt Lake City, Utah	Oct. 25	Apr. 14	67.5
Burlington, Vermont	Oct. 14	Apr. 8	96.2
Lynchburg, Va.	Nov. 20	Mar. 17	17.0
Norfolk, Va.	Dec. 25	Mar. 25	5.6
Richmond, Va.	Nov. 20	Mar. 21	11.0
Olympia, Wash.	Nov. 28	Apr. 5	14.7
Seattle, Wash.	Dec. 2	Apr. 15	9.4
Spokane, Wash.	Oct. 31	Apr. 1	57.2
Charleston, W. Va.	Oct. 18	Apr. 7	30.5
Elkins, W. Va.	Oct. 8	Apr. 5	68.0
Green Bay, Wis.	Oct. 15	Apr. 8	41.3
La Crosse, Wis.	Oct. 23	Apr. 7	35.3
Madison, Wis.	Oct. 19	Apr. 5	37.0
Milwaukee, Wis.	Oct. 22	Apr. 6	47.3
Casper, Wyoming	Oct. 12	Apr. 9	94.1
Cheyenne, Wyoming	Oct. 11	Apr. 10	43.4

Source: The 3rd Jacobsen Snow Almanac

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